

AGREEMENT FOR PROFESSIONAL SERVICES

This agreement (“Agreement”), is by and between the Sonoma County Regional Climate Protection Authority (“RCPA”), a California public agency, and the County of Sonoma, a political subdivision of the State of California (hereinafter “County”). RCPA and the County may be individually referred to as a “Party” or collectively as “Parties.”

R E C I T A L S

WHEREAS, RCPA is a member of the San Francisco Bay Area Regional Network (“BayREN”). 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; and

WHEREAS, RCPA has entered into a funding and implementation agreement with the Association of Bay Area Governments for BayREN programs; and

WHEREAS, County, through the County Administrator’s Office Climate Action and Resiliency Division (“CARD”) represents that it is experienced in implementing and managing energy efficiency and sustainability programs; and

WHEREAS, in the judgment of the RCPA, it is necessary and desirable to employ the services of the CARD to assist with marketing, outreach, and implementation of BayREN programs; and

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual covenants contained herein, the parties hereto agree as follows:

A G R E E M E N T

1. Scope of Services.

1.1 Scope of Services. County agrees to provide the services as described in Exhibit A. Notwithstanding, services shall be non-exclusive and nothing herein shall prohibit County from referring customers to or providing information regarding additional or other products or services from other entities or companies.

1.2 Performance Standard. County warrants that it possesses the necessary training, experience and skill to competently and professionally provide the services described in Exhibit A. County agrees that its work will be performed and its operations conducted in accordance with the standards of a reasonable professional having specialized knowledge and expertise in the services provided under this Agreement.

1.3 Staffing and Coordination. County shall cooperate, and closely coordinate, with RCPA staff in providing all services under this Agreement.

2. Payment.

2.1 Payment Terms. For all services and incidental costs required hereunder, County shall be paid in accordance with the budget set forth in Exhibit B provided, however, that total payments to County shall not exceed \$628,025 without the prior written approval of RCPA. The Parties understand that additional funding may become available through the BayREN Coordinating Circle or other related sources. In such event, the Parties may increase the budget amounts stated herein, to be reflected in written and signed amendment to this Agreement.

2.2 Payment. County shall submit one invoice each calendar month in which services are performed. Invoices shall include copies of receipts for authorized reimbursable expenses, and contain the following detail for each billable entry:

- a. Date
- b. Description of work performed and person involved
- c. Time spent in .5 hour increments and assigned to BayREN Program budget category and account

Upon receipt of properly prepared invoicing, RCPA shall pay County within 30 calendar days for services provided in accordance with this Agreement, applying the following rates:

- a. Most-current adopted County hourly rates for the involved County staff
- b. Material, equipment, and other “hard cost” expenses, at cost

3. Term of Agreement. The term of this Agreement shall be from January 1, 2024, to December 31, 2025, unless terminated earlier in accordance with the provisions of Article 4 below.

4. Termination. Notwithstanding any other provision of this Agreement, at any time and without cause, the Parties shall have the unequivocal right to terminate this Agreement by giving thirty (30) calendar days written notice to the other Party. In the event of any termination, County, within fourteen (14) calendar days following the date of termination, shall deliver to RCPA all materials and work product subject to Section 1 and shall submit to RCPA a final invoice for all outstanding payments. RCPA shall promptly pay County for all services otherwise satisfactorily rendered and all expenses properly incurred.

5. Indemnification. Each party shall indemnify, defend, protect, hold harmless, and release the other, its officers, agents, and employees, from and against any actions, and all claims, loss, proceedings, damages, liabilities, disabilities, costs or expenses (including attorney’s fees and witness costs) arising from or in connection with this Agreement, or caused by any act, omission, or negligence of such indemnifying party or its agents, employees, contractors, subcontractors, or invitees with regard to this Agreement. This indemnification obligation is not limited in any way

by any limitation on the amount or type of damages or compensation payable to or for the indemnifying party or its agents, employees, contractors, subcontractors, or invitees under workers' compensation acts, disability benefits acts, or other employee benefit acts.

6. Insurance. County shall maintain insurance and/or self-insurance as described below unless such insurance has been expressly waived in writing by RCPA.

- a. Workers Compensation insurance with statutory limits as required by the Labor Code of the State of California, and Employers Liability with minimum limits of \$1,000,000 per accident; \$1,000,000 disease per employee; \$1,000,000 disease per policy.
- b. Commercial General Liability Insurance with Minimum Limits: \$1,000,000 per occurrence; \$2,000,000 general aggregate; \$2,000,000 products/completed operations aggregate. The required limits may be provided by a combination of General Liability Insurance and Commercial Umbrella Liability Insurance.
 1. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. County is responsible for any deductible or self-insured retention and shall fund it upon RCPA's written request, regardless of whether County has a claim against the insurance or is named as a party in any action involving RCPA.
 2. RCPA shall be an additional insured for liability arising out of operations by, or on behalf of, County in the performance of this Agreement.
 3. The insurance provided to the additional insureds shall be primary to, and non-contributory with, any insurance or self-insurance program maintained by them.
 4. The policy shall cover inter-insured suits between the additional insureds and County and include a "separation of insureds" or "severability" clause which treats each insured separately.
- c. Automobile Liability Insurance with Minimum Limit of \$1,000,000 combined single limit per accident. Automobile Insurance shall apply to all owned autos.
- d. Professional Liability/Errors and Omissions Insurance with Minimum Limit of \$1,000,000 per claim or per occurrence. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the insurance is on a Claims Made basis, the retroactive date shall be no later than the commencement of the work. Coverage applicable to the work performed under this Agreement shall be continued for two (2) years after completion of the work. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the work under this Agreement.
- e. The Certificate of Insurance must include the following reference: Sonoma County Regional Climate Protection Authority.
- f. All required Evidence of Insurance shall be submitted to RCPA within 3 business days of the Effective Date. County agrees to maintain current Evidence of Insurance on file with RCPA for the entire term of this Agreement.
- g. The name and address for Additional Insured endorsements and Certificates of Insurance is: Sonoma County Regional Climate Protection Authority, Attn:

Contract Administration, 411 King St, Santa Rosa, CA 95404.

- h. Required Evidence of Insurance shall be submitted for any renewal or replacement of a policy that already exists, at least ten (10) business days before expiration or other termination of the existing policy.
- i. County shall provide RCPA immediate written notice if any of the required insurance policies are terminated.
- j. County's indemnity and other obligations shall not be limited by these insurance requirements.

7. Status of County: County, in performing the services under this agreement, shall act as an independent contractor and shall control the work and the manner in which it is performed. At no time shall County employees act as an agent or employee of RCPA and at no time shall County employees be entitled to participate in any pension plan, worker's compensation plan, insurance, bonus, or similar benefits RCPA provides its employees. In the event RCPA exercises its right to terminate this Agreement pursuant to Section 4, County expressly agrees that its employees shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees.

8. No Suspension or Debarment. County warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in covered transactions by any federal department or agency. Consultant also warrants that it is not suspended or debarred from receiving federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the General Services Administration. If the Consultant becomes debarred, consultant has the obligation to inform the County

9. Records Maintenance. Consultant shall keep and maintain full and complete documentation and accounting records concerning all services performed that are compensable under this Agreement and shall make such documents and records available to County for inspection at any reasonable time. Consultant shall maintain such records for a period of four (4) years following completion of work hereunder.

10. Statutory Compliance. County shall comply with all applicable federal, state and local laws, regulations, statutes and policies applicable to the services provided under this Agreement as they exist now and as they are changed, amended or modified during the term of this Agreement.

11. Nondiscrimination. Without limiting any other provision of this Agreement, County shall comply with all applicable federal, state, and local laws, rules, and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, sexual orientation or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated by reference.

15. Miscellaneous Provisions.

15.1 No Waiver of Breach. The waiver by RCPA of any breach of any term or promise contained in this Agreement shall not be deemed to be a waiver of such term or provision or any subsequent breach of the same or any other term or promise contained in this Agreement.

15.2 Construction. To the fullest extent allowed by law, the provisions of this Agreement shall be construed and given effect in a manner that avoids any violation of statute, ordinance, regulation, or law. The Parties covenant and agree that in the event that any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired, or invalidated thereby. The Parties acknowledge that they have each contributed to the making of this Agreement and that, in the event of a dispute over the interpretation of this Agreement, the language of the Agreement will not be construed against one party in favor of the other. Parties acknowledge that they have each had an adequate opportunity to consult with counsel in the negotiation and preparation of this Agreement.

15.3 Consent. Wherever in this Agreement the consent or approval of one party is required to an act of the other party, such consent or approval shall not be unreasonably withheld or delayed.

15.4 No Third Party Beneficiaries. Nothing contained in this Agreement shall be construed to create and the parties do not intend to create any rights in third parties.

15.5 Applicable Law and Forum. This Agreement shall be construed and interpreted according to the substantive law of California, regardless of the law of conflicts to the contrary in any jurisdiction. Any action to enforce the terms of this Agreement or for the breach thereof shall be brought and tried in Santa Rosa or the forum nearest to the city of Santa Rosa, in the County of Sonoma.

15.6 Exhibits. In the event of a conflict between the body of this Agreement and any Exhibits or attachments, the language in the body of this Agreement shall prevail.

15.7 Captions. The captions in this Agreement are solely for convenience of reference. They are not a part of this Agreement and shall have no effect on its construction or interpretation.

15.8 Merger. This writing is intended both as the final expression of the Agreement between the parties hereto with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement, pursuant to Code of Civil Procedure Section 1856. No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both parties.

15.9. Survival of Terms. All express representations, waivers, indemnifications, and limitations of liability included in this Agreement will survive its completion or termination for any reason.

15.10 Time of Essence. Time is and shall be of the essence of this Agreement and every provision hereof.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

County of Sonoma:

APPROVED AS TO FORM FOR COUNTY:

By: _____

By: _____
County Counsel

Name: _____

Date: _____

Title: _____

Date: _____

APPROVED AS TO FORM FOR RCPA:

Sonoma County Regional Climate
Protection Authority

By: _____
RCPA Counsel

By: _____

Date: _____

Name: _____

Title: _____

Date: _____

**EXHIBIT A
SCOPE OF SERVICES**

RCPA and CARD's Partnership to Increase BayREN Impact and Program Benefits for Sonoma County residents and businesses for the calendar years 2024–2025.

Roles and Responsibilities

RCPA will retain some Administrative budget to coordinate monthly billing and reporting to ABAG/MTC and to remain engaged as the representative for Sonoma County on the BayREN Coordinating Circle. CARD will submit monthly invoices and a narrative report detailing work performed to the RCPA at least two days ahead of the deadline to submit to ABAG, for work performed and expenses allowable pertaining to the services to be provided.

CARD will perform the following ADMINISTRATIVE responsibility within the BayREN Scope of Services for BayREN programs: Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs. RCPA will perform all other ADMINISTRATIVE responsibilities within the BayREN Scope of Services for BayREN programs. CARD will perform all MARKETING & OUTREACH and IMPLEMENTATION responsibilities within the Scope of Services for the following BayREN programs as outlined in Attachments 1B, 1C, 1D, 1E, 1F, 1G, 1H, 1J, and 1K. For the Water Upgrades Save Program outlined in Attachment 1I, CARD will perform only the local IMPLEMENTATION tasks outlined in Marketing and Outreach – Local Outreach for Sonoma County.

Coordination

RCPA will convene monthly check in calls with the CARD to check in on program activities, challenges and questions and to communicate relevant updates from ABAG/MTC to CARD staff. RCPA will attend monthly BayREN Coordination Committee meetings/calls and will invite CARD staff to attend when appropriate.

Attachment 1B - BayREN Single Family Program
Scope of Work

The BayREN Single Family program focuses on homeowners and renters that are consistently underserved in ratepayer energy efficiency programs, including moderate-income single-family households, and households that primarily speak a language other than English. BayREN Member Agencies will provide services in their jurisdictions to support the BayREN Single Family program. These tasks include local outreach to single family residents (homeowners and renters); contractor recruitment, support and engagement and coordination with the BayREN Single Family Committee. Tasks below are based on local budget and capacity to deliver services.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county.

Implementation – Decarbonization Education and Checklist Pilot

Purpose: Improve electrification checklist provided through green labeling and make available to the homeowner to serve as a homeowner education opportunity and workforce development tool.

Role Accountabilities:

- Drafting learning objectives, abstract, and outline for building professional class
- Developing and implementing an advanced electrification checklist and report using the current Home Energy Score (HES) electrification checklist
- Establishing partnerships with local organizations to promote the advanced electrification checklist
- Conducting training on electrification checklist to Home Energy Advisors, energy professionals, and building professionals
- Developing curriculum for a basic certification class for building professionals, leveraging home assessment guide for pros – home score
- Developing curriculum and conducting a homeowner class related to electrification
- Coordinating electrification checklist presentations to homeowner community groups, organizations, and/or employers
- Providing program administration
- Documenting the pilot process, educational materials developed, and reporting achievements, equity, and workforce elements
- Analyzing local pilot performance to identify gaps, recommendations, and lessons learned

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the Single Family program at the county level.

Role Accountabilities:

- Providing program support and information to potential and participating contractors active within the County, as mutually agreed upon by the Program Lead and County Representative. Support activities include:
- Organizing local realtor and contractor networking event(s) to promote the BayREN Single Family Program
- Establishing partnerships with local organizations to promote the Single Family Program
- Conducting direct mail campaigns and obtain mortgage, refinance, or similar mailing list(s)
- Organize homeowner workshops to promote the Home+ Program and Participating Contractors
- Coordinate presentations to homeowner community groups, organizations, and/or employers
- Identifying homeowner case study/studies and presenting to the Coordinating Circle
- Creating and/or maintaining stakeholder partnerships such as Energy Watch programs, Community Choice Aggregators/Community Choice Energy, and Community Based Organizations to assist in outreach of the Program

- Printing of program collateral
- Collaborating with Home Energy Advisors by sending emails for lead generation
- Hosting program information on local website(s) and County social media platforms
- Providing Program Lead with local information, contacts and data that support and promote the Program
- Providing Program Lead information on all planned Program related events in the County
- Reporting on best and highest performing activities to the Single Family Coordinating Circle
- Reporting on any unsuccessful strategies to the Coordinating Circle
- Analyzing local Program performance to identify gaps and recommendations to Program Lead
- Coordinating with Rising Sun to identify not-yet-reached communities in the County
- Sharing with the Single Family Coordinating Circle Program marketing material developed by the County
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Attachment 1C - BayREN Green Labeling Program

Scope of Work

BayREN's 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. BayREN Member Agency's role is to implement the Home Energy Score program, provide real estate sector education, coordinate County-level real estate engagement, and engagement and coordination with the BayREN Green Labeling Committee.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the Green Labeling program at the county level.

Role Accountabilities:

- Participating in bi-monthly calls on program development and implementation
- Promoting and attending BayREN real estate trainings in BayREN Member Agency and/or adjacent counties to provide information on BayREN and build connections with local real estate professionals
- Promoting HES rebates through workshops, mailings, social media, or other outreach campaigns
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Maintaining and developing relationships with existing or potential HES Assessors
- Identifying local venues or homes for trainings and tours
- Maintaining and developing relationships with local real estate associations, presenting at realtor meetings, hosting realtor networking events
- Providing Program Lead with local information, contacts and data that support and promote the Program
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Attachment 1D - BayREN Multifamily Program

Scope of Work

The BayREN Multifamily program provides property owners and managers with customized technical assistance, measures specifically designed for the multifamily sector, benchmarking of multifamily sites (when appropriate), and incentives to help overcome sector barriers to energy efficiency. Each of the BayREN participating members, including BayREN Member Agency, will provide services in their jurisdictions to support the BayREN Multifamily program. These tasks include local outreach to recruit property owners, support to the consultant providing technical assistance services to local property owners, assistance with recruiting contractors for trainings, and coordination with the BayREN Multifamily Committee.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the Multifamily program at the county level.

Role Accountabilities:

- Recruiting property owners and contractors through local activities and events
- Ensuring outreach is done in all jurisdictions within the member county (towns, cities, unincorporated areas, etc.)
- Planning and organization of local outreach events
- Coordinating with Energy Watch/Local Government Partnership, CCAs, Munis and other local programs
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Hosting program information on local website(s) and suggesting local media and social media outlets for program content
- Providing Program Lead with local information, contacts and data that support and promote the Program
- Gathering information needed for assembling workable, targeted multifamily property owner contact lists
- Reporting on best and highest performing activities to the Multifamily Circle
- Coordinating with local jurisdictions and industry associations to foster relationship-building between local municipal governments and multifamily property owners
- Supporting Program Lead with market analysis studies by providing outreach data requested
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Marketing & Outreach – Sonoma County Multifamily Lead Generation Pilot

Purpose: Support the Multifamily program at the county level.

Role Accountabilities:

- Leading additional/enhanced marketing to increase awareness of BayREN multifamily incentives and financing
- Developing workshops to address the unique needs of different audiences — tenants, owners, and property managers to bridge the knowledge gap between owners and tenants and strengthen relationships with property owners and management companies
- Developing comprehensive multifamily housing contact list
- Sending out direct mailer to multifamily owners and property managers
- Drafting a final report that includes lessons learned and guidance on replicability/scalability for other counties

Attachment 1E - BayREN Commercial Program
Scope of Work

BayREN Business focuses on helping hard-to-reach businesses with reducing their utility costs through energy efficiency retrofits. Each of the BayREN participating members, including BayREN Member Agency, will provide services in their jurisdictions to support the BayREN Commercial program. These tasks include local outreach to recruit small-and-medium business owners, marketing support to the consultant providing technical assistance services to local business owners, assistance with recruiting workshop participants, and coordination with the BayREN Commercial Committee.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the Commercial program at the county level.

Role Accountabilities:

- Aiding in the development of marketing strategies, messaging, creative, and collateral as needed
- Recruiting property owners, contractors, and business decision-makers through local activities and events
- Ensuring outreach to potential participants is done in all jurisdictions within the member county (towns, cities, and unincorporated areas)
- Facilitating introductions to local Chambers of Commerce, local merchant associations, etc.
- Planning and organizing at least one local outreach event, such as street campaigns, presentations to groups like Chambers of Commerce, outreach partnerships with Community Based Organizations, etc.
- Supporting RCPA BayREN Liaison in coordinating with towns, cities and unincorporated areas within the County regarding Commercial program services and information
- Coordination with Energy Watch/Local Government Partnership, and other local programs
- Supporting RCPA BayREN Liaison in coordinating and partnering with County departments and agencies and cities to uncover efficiencies in marketing, such as including a BayREN commercial flier with each newly issued Business License, etc.
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Providing Program Lead with local information, contacts and data that support and promote the Program
- Gathering and researching information, such as demographic and geographic characteristics to develop high-impact marketing lists and optimizing marketing campaign development and execution
- Reporting on best and highest performing activities to the Commercial Circle
- Coordinating with local jurisdictions on ways to select and recognize program participants publicly
- Supporting Program Lead with market analysis studies by providing outreach data requested
- Working with local jurisdictions to distribute case-study content through available media (press releases, websites, newsletters, etc.)
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Attachment 1F - BayREN Refrigerant Replacement Program

Scope of Work

The BayREN Refrigerant Replacement Program will remove harmful Global Warming Potential (GWP) refrigerants from small and medium businesses by providing more affordable and more easily available options for food-service establishments to maintain, retrofit, or replace their refrigeration systems to reduce both refrigerant leakage and energy use. BayREN Business focuses on helping hard-to-reach businesses with reducing their utility costs through energy efficiency retrofits. Each of the BayREN participating members, including BayREN Member Agency, will provide services in their jurisdictions to support the BayREN Refrigerant Replacement program.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the BRRR program at the county level.

Role Accountabilities:

- Aiding in the development of marketing strategies, messaging, creative, and collateral as needed
- Recruiting property owners, contractors, and business decision-makers through local activities and events
- Ensuring outreach is done in all jurisdictions within the member county (towns, cities, and unincorporated areas)
- Facilitating introductions to local Chambers of Commerce, local merchant associations, etc.
- Planning and organizing at least one local outreach event, such as street campaigns, presentations to groups like Chambers of Commerce, outreach partnerships with Community Based Organizations, etc.
- Supporting RCPA BayREN Liaison in coordinating with towns, cities and unincorporated areas within the County regarding Business Refrigerant Replacement program services and information
- Coordinating with Energy Watch/Local Government Partnership, and other local programs
- Supporting RCPA BayREN Liaison in coordinating and partnering with County departments and agencies and cities to uncover efficiencies in marketing
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Providing Program Lead with local information, contacts and data that support and promote the Program
- Gathering and researching information, such as demographic and geographic characteristics to develop high-impact marketing lists and optimizing marketing campaign development and execution
- Reporting on best and highest performing activities to the Commercial Coordinating Circle
- Coordinating with local jurisdictions on ways to select and recognize program participants publicly
- Supporting Program Lead with market analysis studies by providing outreach data requested
- Working with local jurisdictions to distribute case-study content through available media (press releases, websites, newsletters, etc.)
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

**Attachment 1G - BayREN Integrated Energy Services Program
Scope of Work**

The BayREN Integrated Energy Services program focuses on overcoming silos in program offerings related to energy-related improvements to public buildings. The program includes an Energy Concierge to assist local government staff with finding and accessing technical and financial assistance, and an Energy Roadmapping service that helps local governments develop comprehensive and actionable paths forward for improving their facilities. Each BayREN participating member will provide services in their jurisdictions to support the BayREN Integrated Energy Services Program. This work includes conducting outreach to city and county staff; providing support for local government staff participating in the program; coordinating with Community Choice Aggregators (CCAs), Local Government Partnerships (LGPs) and others; and engaging with the Integrated Energy Services Committee and the Coordinating Circle.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Implementation – Local Implementation for Sonoma County

Purpose: Support the implementation of the Integrated Energy Services Program at the county level.

Accountabilities:

- Coordinating with Energy Watch/Local Government Partnership, local Community Choice Aggregator, and other local programs, and facilitating coordination between these offerings and the IES program
- Analyzing local program performance to identify gaps and recommendations to Program Lead
- Supporting local governments who are engaging in the Energy Roadmapping process

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Encourage participation in Integrated Energy Services Program activities.

Role Accountabilities:

- Aiding in the development of marketing strategies, messaging, and collateral as needed
- Promoting the Energy Concierge and Energy Roadmapping services to local government staff in all jurisdictions within the member county (towns, cities, and the unincorporated county)
- Hosting program information on local website(s) and suggesting local media and social media outlets for program content
- Creating and maintaining relationships with local government staff and organizations of staff members, and presenting about the program at meetings as appropriate
- Providing the Program Lead with local information, contacts and data that support and promote the program
- Sharing outreach and marketing materials, approaches, and outcomes with the IES Committee
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

**Attachment 1H - BayREN Targeted Decarbonization Services Program
Scope of Work**

The BayREN Targeted Decarbonization Services Program supports local government efforts to carry out efficient decarbonization efforts in their buildings. The program includes a Decarbonization Showcase that works with real-world buildings to develop detailed case studies and appropriate metrics, as well as an Education and Financing service that educates local government staff about decarbonization-related building improvements and also addresses the cost of these improvements. County staff will provide services in their jurisdictions to support the Targeted Decarbonization Services Program. This work includes conducting outreach to city and county staff; providing support for local government staff participating in the program; coordinating with Community Choice Aggregators (CCAs), Local Government Partnerships (LGPs) and others; and engaging with the Targeted Decarbonization Services Committee.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Implementation – Local implementation for Sonoma County

Purpose: Support the implementation of the Targeted Decarbonization Services Program at the county level.

Role Accountabilities:

- Coordinating with Energy Watch/Local Government Partnership, local Community Choice Aggregator, and other local programs, and facilitating coordination between these offerings and the TDS program
- Analyzing local program performance to identify gaps and recommendations to Program Lead
- Supporting local governments who have buildings participating in the Decarbonization Showcase

Marketing & Outreach – Local outreach for Sonoma County

Purpose: Encourage participation in Targeted Decarbonization Services Program activities.

Role Accountabilities:

- Aiding in the development of marketing strategies, messaging, and collateral as needed
- Promoting the Energy Concierge and Energy Roadmapping services to local government staff in all jurisdictions within the member county (towns, cities, and the unincorporated county)
- Hosting program information on local website(s) and suggesting local media and social media outlets for program content
- Attending decarbonization program trainings to provide information on BayREN and build connections with local government staff
- Creating and maintaining relationships with local government staff and organizations of staff members, and presenting about the program at meetings as appropriate
- Providing the Program Lead with local information, contacts and data that support and promote the program
- Sharing outreach and marketing materials, approaches, and outcomes with the TDS Committee
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Attachment 1I - BayREN Water Upgrades Save Program
Scope of Work

BayREN's Water Upgrades Save program is an innovative on-bill financing program for home improvements related to conservation and energy efficiency for municipal water utilities and their customers. BayREN Member Agency will provide local partner water utility support for implementation and marketing in its capacity for Water Upgrades Save (WUSave). BayREN Member Agency will provide administrative tasks in its capacity as a County Lead.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Admin - Program Lead

Purpose: Optimize program performance.

Role Accountabilities:

- Participating in the Coordinating Circle, including providing updates on program activities and ensuring that the program is consistent with the overall direction of the Coordinating Circle
- Allocating program resources by incorporating feedback from Program Circle members
- Assigning program roles, monitoring role performance, providing feedback to enhance performance, and removing individuals or organizations from roles
- Assessing and defining program priorities and strategies
- Defining metrics for the program
- Overseeing program-specific marketing efforts and materials
- Facilitating Program Circle meetings, including soliciting input from the Program Circle on program priorities and providing updates on program performance
- Convening an annual meeting of the Program Circle to introduce any program changes and provide annual program goals, intentionally considering each County Lead and whether there should be county-specific goals

Admin - WUSave Admin Coordination

Purpose: Smooth day-to-day program implementation.

Role Accountabilities:

- Coordinating with Program Lead, Steward, and County Leads, BayREN Administrator, WUSave technical team, Partner Utilities, PG&E, CPUC, and EM&V consultants
- Reporting on program progress and supporting Program Administrator in responding to data requests
- Managing technical sub consultant team
- Adapting and adjusting program as needed
- Monitoring regulatory activities that impact program and representing Program in relevant stakeholder groups, committees and advisory groups
- Refining near-term priorities to enable a regional program model and provide access to centralized funding and administration through ABAG/MTC
- Overseeing WUSave planning and meetings; monthly meetings anticipated:
 - One WUSave Circle meeting with Program Lead, Steward, County Leads, Implementation Team, and BayREN Administrator
 - One Administrative meeting per month with BayREN Administrator, Program Lead, and Implementation Team
 - Four WUSave Management meetings with Program Lead and Implementation Team
 - Four WUSave Design meetings with Program Lead and Technical Assistance Team
 - Four WUSave Operations meetings with Program Lead, Implementation Team, and Operator
 - Four WUSave Tariff On-Bill meetings with Program Lead and Tariff On-Bill Consultant

- One Coordinating Circle

Admin - WUSave Accounting

Purpose: Proper handling of utility ratepayer funds.

Role Accountabilities:

- Adhering to regulatory requirements and guidelines
- Monitoring and forecasting budget, expenditures, and receivables
- Processing sub-consultant and partner utility invoices
- Submitting monthly invoices and reporting

Implementation – Local Implementation for Sonoma County

Purpose: Support the WUSave Program at the county level.

Role Accountabilities:

- Participating in monthly WUSave Committee phone meetings; one-to-two ad hoc WUSave planning and meetings as requested by Program Lead
- Assessing local water, climate, and housing policy for alignment with WUSave.
- Facilitating access to County Tax Assessor and other property data to support targeted marketing.
- Identifying local leaders/champions in water space.
- Participating in outreach activities, as requested, including: (1) Write letter of support to target utility's parent local government entity, (2) attend up to three enrollment meetings and present on the BayREN organization, and (3) recommend relevant local government and community leaders the program can approach for endorsement letters.
- Assisting in development of local multifamily property leads.
- Assisting in development of local commercial property leads.
- Serving as a local contact for WUSave utilities in the County for questions about BayREN
- Providing Program Lead, as requested, with data and information from existing local and regional water stakeholder groups and initiatives to assist with utility enrollment, such as local contacts at target utility city or county governments; multifamily housing associations; multifamily property management businesses; Home Owners Associations; community organizations; and water agency conservation efforts and stakeholder groups
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Implementation – WUSave Coordination

Purpose: Smooth day-to-day program implementation.

Role Accountabilities:

- Designing WUSave and preparing all associated documentation in compliance with all applicable laws and regulations
- Hosting WUSave Circle meetings and participating in BayREN working groups
- Subcontracting and managing technical subconsultant team

- Contracting with and managing Program Operator in compliance with all applicable laws and regulations
- Ensuring Program Operator and all other contractors and consultants are in performance of contract deliverables

Implementation – Program Design & Technical Assistance (Design)

Purpose: Provide excellent customer service and value to partner utilities through the development and delivery of the WUSave program.

Role Accountabilities:

- Determining target customer and building sector(s), and targeted measures including: preparing a market analysis for small and medium commercial customers that identifies improvement measures that support a WBSP commercial offer and conducting a market survey to identify relevant commercial property characteristics within target utility territories (e.g., is the property owned or leased, is the property carrying debt, etc.)
- Expanding the list of eligible improvements, including those that align with State water policy (e.g., outdoor and leak repair), and provide increased opportunities for deeper improvements and greater environmental and economic benefits
- Developing and updating program agreements, forms, and other required documentation for regional program that facilitate contractor oversight and payment, customer on-bill services and repayment obligations, and utility repayment regardless of collections
- Developing and refining operational procedures for: Start up; contractor services and measure delivery; eligibility thresholds for common improvements; audit/analysis requirements for improvements without eligibility thresholds; project and program QA/QC protocols; financial operations, etc.; and successor customers at the project location including noticing of Program benefits and obligations and other customer education
- Developing and implementing training curriculum for utilities, contractors, vendors, etc.
- Evaluating opportunities for reduced program or project costs such as through bulk procurement; other contracting opportunities for identified services and materials; and establishing a process for obtaining project buy-down funding for underserved customers to support services such as landscaping improvements
- Working with legal experts to develop research, written opinions, review of and comment on existing draft agreements, and testimony as requested in writing by RCPA to address legal and regulatory issues and associated questions related to Program
- Developing a self-funding business plan and white paper that describes how the program can become a standalone service funded entirely through the utility investment capital
- Assisting in the development of a long-term capital plan to support program growth
- Supporting BayREN Business Plan and CPUC Implementation Plan updates and BayREN CPUC Financing Rulemaking activities.

- Ensuring to the extent possible that the regional program design for water utilities also helps local governments meet projected energy savings and greenhouse gas reduction targets and pursuing effective Water-Energy Nexus calculation methods and tools to verify the energy efficiency benefits of water conservation and move toward possible resource program status
- Supporting EM&V efforts for BayREN reporting

Implementation – Program Design & Technical Assistance (Enrollment)

Purpose: Provide excellent customer service and value to partner utilities through the development and delivery of the WUSave program.

Role Accountabilities:

- Advising and assisting current Partner Utilities in transitioning into the regional program. Coordinating with pilot on-bill programs to raise awareness and increase customer demand with the potential to transition these into the regional program model once launched
- Developing and supporting BayREN-led outreach strategy to potential partner utilities, wholesalers, and associated local government leadership to effectively enroll partner utilities in a regional program model, including tasks such as: Drafting presentations for delivery at utility, wholesaler, and local government outreach meetings and attendance/co-delivery of presentations as necessary; collaborating with wholesalers to align on-bill service with existing conservation programs; deploying a utility enrollment campaign to support local utility champions in getting official approval for the WUSave Master Agreement and Rate and Fee Schedule; facilitating the adoption of model fee schedule and on-bill program design for market consistency; and developing and conducting Utility Staff Onboarding trainings
- Developing a utility “opt-in tool kit” for regional program, including elements such as: Details related to local water rates and building stock assessment; opportunities to package on-bill service with existing conservation programs; support for on-bill charge authorization and billing systems requirements; assessment of water and energy savings and economic impact potential; confirmation of minimum expected staff and resource requirements; and a model on-bill rate and fee schedule to be used by Partner Utilities. Customizing “opt-in tool kit” to respond to utility market conditions
- Supporting Program Operator contractor enrollment strategy in concert with partners and stakeholders; supporting BayREN program coordination; and providing Program Operator ramp-up funding

Implementation – Program Design & Technical Assistance (Digital Resources)

Purpose: Provide excellent customer service and value to partner utilities through the development and delivery of the WUSave program.

Role Accountabilities:

- Supporting an IT platform for program management and communications between the Program Operator and Program Contractors, Participating Customer support, ABAG finance service reporting and repayment, and BayREN program reporting, and utility enrollment activity tracking

- Establishing data protocols and processes to support customer services and program reporting, including tasks such as establishing a customer-facing Customer Service project planning/action tool; establishing an Implementer-facing Program Management hub to customize IT tracking/reporting; and establishing an ABAG-facing Financing Service Automation service for project and utility payments
- Developing and refining program software tools, which may include cost-effectiveness calculator(s) for use with multiple utilities; IT and billing system supports and interfaces to help streamline utility billing system updates required to initiate, track, and transfer the on-bill charge; automated tools to facilitate routing and signature of program agreements and invoice and other report formats; and using Program Operator IT platform to automate ABAG funding/repayment tracking, customer service, and program reporting
- Consistent with available budget and partner needs and engagement, exploring development of Multi-Billing-System with Application Program Interface (API) modules to provide automatic, plug-and-play access to utility customer account data to automate the tracking of customer repayments and reporting of project performance to utility staff and ABAG financing service and assess and integrate technological innovations, as funding and availability allow

Implementation – Program Design & Technical Assistance (Management)

Purpose: Provide excellent customer service and value to partner utilities through the development and delivery of the WUSave program.

Role Accountabilities:

- Providing oversight for WUSave coordination and day-to-day operations
- Assisting BayREN and partner utilities through procurement of capital, contractors, vendors, and other Program services as needed
- Supporting development of other regional program strategies and support mechanisms as necessary for launch and operation of regional program
- Convening program review meetings with each Partner Utility on an as needed basis and processing utility agreements
- Establishing protocols for program reporting, such as obtaining water customer account data; securing PG&E Share My Data Third-Party Operator Certification, as needed; establishing Personal Identifiable Information (PII) protocols; establishing Resource Program data tracking and reporting systems, as needed; and establishing Key Performance Indicators (in alignment with BayREN) tracking
- Supporting BayREN activities in exploring statewide and or electrification tariff on-bill program initiatives

Implementation – Marketing & Outreach Regional

Purpose: Support the WUSave program at the regional level.

Role Accountabilities:

- Developing and or supporting BayREN's marketing activities for regional program, which may include outreach collateral aligned with and in support of other BayREN programs; marketing collateral templates for a range of program

stakeholders; and a program specific customer engagement and project facilitation website/portal

- Developing and supporting partner utility customer-focused marketing campaign with activities that may include marketing collateral templates for partner utilities, web content for partner utility websites, and bilingual program collateral
- Supervising marketing/branding consultant implementation of customer-focused and utility enrollment marketing plan and outreach campaigns including development of social media targeted-advertising campaign strategy, and BayREN aligned marketing and outreach activities, and communications services for messaging design and team coaching
- Supporting partner utility customer marketing campaigns
- Developing relationships with and presenting to market partners such as real estate and finance industry associations; contractor networks/associations; property owner groups/associations; efficiency-as-a-service companies/organizations; and community-based organizations to promote the program and gather input to enable regional expansion
- Supporting engagement with water sector stakeholder groups such as regional water conservation organizations; water wholesalers; and state water policy agencies including the Department of Water Resources and State Water Resources Control Board
- Supporting WUSave Partner Utility enrollment through outreach to Bay Area water utilities/agencies, Bay Area City and County managers, and elected officials; customers; the general public; and other stakeholders, such as the BayREN members

Attachment 1J - BayREN Codes & Standards Program

Scope of Work

The BayREN Member Agencies will provide services in their jurisdictions to support the BayREN Codes & Standards Program. These tasks include: coordination with the BayREN Codes and Standards Committee and Coordinating Circle; promotion of trainings, over the counter and electronic compliance improvement tools, regional forums, and reach code and zero net energy (ZNE) policy resources; and engagement with the Bay Area chapters of the International Code Council (ICC), City and County Board of Supervisors, local governments within their respective County and other key stakeholders (local contractor and building professional groups/associations, property owner and building operator associations, etc.). Tasks below are assigned based on local budget and capacity to deliver services.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Implementation – Codes Project Lead

Purpose: Day-to-day management of a Codes project.

Role Accountabilities:

- Developing a workplan and schedule for the project in consultation with the Codes and Standards Program Lead
- Allocating resources for project activities within the approved budget
- Assigning roles for project implementation and managing subconsultant activities
- Coordinating activities with Codes and Standards Program Lead and other program activities
- Obtaining input from Codes & Standards Circle on program design options
- Adapting and adjusting program design and details as needed
- Ensuring timely completion of deliverables
- Reporting on progress to Codes and Standards Circle
- Documenting program challenges, successes, and key information

Implementation – Energy Code Survey (Codes Project, 2024-2025)

Purpose: Survey property owners to gauge energy code understanding.

Role Accountabilities:

- Developing survey questions and methodology
- Administering questions as part of Energy Code consultations for 2024-2027
- Tracking and analyzing survey data
- Providing results to Program Lead annually

Implementation – Local Outreach for Sonoma County

Purpose: Support the codes & standards program at the county level.

Role Accountabilities:

- Attending and participating in Codes & Standards calls and meetings, including sharing information on relevant county projects, best practices, and similar codes-related topics
- Supporting RCPA BayREN Liaison in sharing the Codes and Standards Committee information and resources with local governments and ideas for supporting local governments to improve code compliance
- Providing Program Lead with local information, contacts and data to support the Program
- Recruiting local governments for hosting BayREN trainings, ensuring that all arrangements are made for training sessions, and providing feedback from participants
- Promoting quarterly Forum events, including providing email, phone, and other marketing assistance
- Supporting energy policy consideration and adoption at the local government level
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels
- Providing local coordination and assistance for jurisdictions that may benefit from or be interested in BayREN compliance improvement tools

- Coordinating with local CCAs and other program implementers in BayREN Member Agency
- Analyzing local program performance to identify gaps and make recommendations to Program Lead
- Providing technical support to RCPA BayREN Liaison on an as needed basis to promote availability of information and resources
- Coordinating with RCPA BayREN Liaison to partner with local community-based organizations and local governments to facilitate outreach and education to Sonoma County Black, Indigenous, and Other People of Color (BIPOC) communities

Implementation – Reach Code & Policy Working Group

Purpose: Develop and implement reach code and policy priorities for BayREN.

Role Accountabilities:

- Participating in Reach Code & Policy Working Group calls and meetings
- Exploring, identifying, and supporting activities to encourage and enable adoption and implementation of local government reach codes and other local, regional, and state energy policies.
- Providing support for local governments within Sonoma County interested in adopting a reach code or energy policy
- Sharing information with the Working Group regarding local interests and activities related to reach codes and energy policies
- Contributing to the design of BayREN activities to support reach codes and energy policies

Implementation – Codes Organization Liaison

Purpose: Build relationships with local code official organizations.

Role Accountabilities:

- Attending monthly meetings, and building or strengthening relationships with members
- Representing BayREN at local ICC chapters, code official associations and similar organizations
- Providing information about BayREN Codes program offerings, such as trainings and Forums, at meetings and with members as appropriate
- Sharing with the Codes and Standards Committee information from meetings and ideas for supporting local governments to improve code compliance

Implementation – Technical Advisor

Purpose: Provide technical or policy expertise to the Codes & Standards program.

Role Accountabilities:

- Providing technical information, resources, and advice to county representatives and the Program Lead as needed on identified topics
- Sharing technical perspective and advice on committee calls as appropriate
- Working to increase technical knowledge

Attachment 1K - BayREN Workforce Education & Training Program

Scope of Work

BayREN's Workforce Education & Training Program will build the energy efficiency workforce by targeting youth from low-income communities and set them on a path to earning family-sustaining wages.

Admin - County Lead

Purpose: Representing BayREN Member Agency context within BayREN.

Role Accountabilities:

- Removing constraints within BayREN that limit its ability to collaborate and deliver effective programs
- Seeking to understand Tensions conveyed by any of BayREN Member Agency stakeholders applicable to the BayREN programs, and discerning those appropriate to channel into Coordinating Circle for processing
- Sharing the perspective of BayREN Member Agency stakeholders
- Communicating with BayREN Member Agency stakeholders about BayREN programs and activities
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Establishing that member has been selected by its county to act on its behalf
- Ensuring that member has expertise and experience in energy-related project management and implementation
- Ensuring invoices and reporting are submitted to Program Administrator in a timely manner
- Developing and reviewing program performance, and program and pilot recommendations
- Reviewing and authorizing program changes
- Implementing BayREN communication strategies in Sonoma County
- Developing specific goals for BayREN Member Agency in line with the BayREN Business Plan, including strategies for managing and operating BayREN efforts more effectively and leveraging other programs within the county

Marketing & Outreach – Local Outreach for Sonoma County

Purpose: Support the Workforce Education & Training program at the county level.

Role Accountabilities:

- Participating in quarterly calls on workforce education, development, and implementation.
- Identifying potential externship opportunities for Climate Careers youth within the county as well as long-term placements for green jobs.
- Promoting Climate Careers summer job opportunities to other county stakeholders such as CBOs, schools, workforce development departments, colleges, etc.
- Promoting in-person Green House Calls and virtual energy efficiency kits to residents through websites, newsletters, social media, ads.
- Promoting Green House Calls through mailers for targeted residents with appropriate county logos and partnership acknowledgement.
- Identify in-person offices site location (if applicable) to host summer Green House Call program
- Supporting RCPA BayREN Liaison by providing program content for local jurisdiction communications channels

EXHIBIT B
Calendar Years 2024–2025 Budget Not to Exceeds

Attachment	Subprogram	Budget Category	2024		2025		Budget Total
			RCPA	CARD	RCPA	CARD	
<u>1A</u>	-	Portfolio Administration	16,707	0	17,208	0	\$33,915
<u>1B</u>	BayREN Single Family	Administration	-	9,106	-	9,379	\$18,485
		Implementation	10,990	63,654	11,320	25,563	\$111,527
		Marketing	-	81,256	-	83,694	\$164,950
		Incentives	-	-	-	-	-
		Subtotal	10,990	154,016	11,320	118,636	\$294,962
<u>1C</u>	BayREN Green Labeling	Administration	-	743	-	765	\$1,508
		Implementation	-	-	-	-	-
		Marketing	10,990	10,609	11,320	10,927	\$43,846
		Incentives	-	-	-	-	-
		Subtotal	10,990	11,352	11,320	11,692	\$45,354
<u>1D</u>	BayREN Multifamily	Administration	-	9,183	-	9,458	\$18,641
		Implementation	-	-	-	-	-
		Marketing	10,990	48,880	11,320	50,346	\$121,536
		Incentives	-	-	-	-	-
		Subtotal	10,990	58,063	11,320	59,804	\$140,177
<u>1E</u>	BayREN Business	Administration	-	3,714	-	3,825	\$7,539
		Implementation	-	-	-	-	-
		Marketing	10,990	17,505	11,320	18,030	\$57,845
		Incentives	-	-	-	-	-
		Subtotal	10,990	21,219	11,320	21,855	\$65,384
<u>1F</u>	BayREN Business Refrigerant Replacement	Administration	-	2,228	-	2,295	\$4,523
		Implementation	-	-	-	-	-
		Marketing	10,990	5,305	11,320	5,464	\$33,079
		Incentives	-	-	-	-	-
		Subtotal	10,990	7,533	11,320	7,759	\$37,602
<u>1G</u>	BayREN Integrated Energy Services	Administration	-	2,228	-	2,295	\$4,523
		Implementation	-	2,122	-	2,186	\$4,308
		Marketing	-	3,183	-	3,278	\$6,461
		Incentives	-	-	-	-	-
		Subtotal	-	7,533	-	7,759	\$15,292

Attachment	Subprogram	Budget Category	2024		2025		Budget Total
			RCPA	CARD	RCPA	CARD	
<u>1H</u>	BayREN Targeted Decarbonization Services	Administration	-	2,228	-	2,295	\$4,523
		Implementation	1,213	5,305	1,250	5,465	\$13,232
		Marketing	9,777	-	10,070	-	\$19,847
		Incentives	-	-	-	-	-
		Subtotal	10,990	7,533	11,320	7,760	\$37,602
<u>1I</u>	BayREN Water Upgrades Save	Administration	7,699	-	7,930	-	\$15,629
		Implementation	1,121,472	5,305	1,129,846	5,464	\$2,262,087
		Marketing	545,320	-	653,534	-	\$1,198,854
		Incentives	-	-	-	-	-
		Subtotal	1,674,491	5,305	1,791,310	5,464	\$3,476,570
<u>1J</u>	BayREN Codes & Standards	Administration	-	1,856	-	1,912	\$3,768
		Implementation	10,990	54,510	11,320	45,695	\$122,515
		Marketing	-	-	-	-	-
		Incentives	-	-	-	-	-
		Subtotal	10,990	56,366	11,320	47,607	\$126,283
<u>1K</u>	BayREN Workforce Education & Training	Administration	-	-	-	-	-
		Implementation	10,990	-	11,320	-	\$22,310
		Marketing	-	5,305	-	5,464	\$10,769
		Incentives	-	-	-	-	-
		Subtotal	10,990	5,305	11,320	5,464	\$33,079
		Annual Total:	1,779,118	334,225	1,899,078	293,800	\$4,306,220