



# COUNTY OF SONOMA

575 ADMINISTRATION  
DRIVE, ROOM 102A  
SANTA ROSA, CA 95403

## SUMMARY REPORT

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**Agenda Date:** 12/16/2025

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**To:** Board of Supervisors

**Department or Agency Name(s):** County Executive's Office

**Staff Name and Phone Number:** Christina Rivera, Christel Querijero, Peter Bruland, Rhianna Frank (707) 565-2431

**Vote Requirement:** 4/5th

**Supervisorial District(s):** Countywide

**Title:**

Approval of Energy & Sustainability Managed Contracts

**Recommended Action:**

- A) Authorize the County Executive or designee to execute the FY 2026-27 Bay Area Regional Energy Network (BayREN) contract with the Sonoma County Regional Climate Protection Authority through December 31, 2027, in the amount of \$283,898, to continue delivery of regional energy efficiency and decarbonization programs. (Majority)
- B) Authorize the County Executive or designee to execute a professional services agreement with Plante Moran for an amount not to exceed \$200,000 to assist the County with Investment Tax Credit (ITC) filings. (Majority)
- C) Adopt a Budget Resolution authorizing budgetary adjustments to the FY 2025-26 Adopted Budget to increase revenue and expenditure appropriations and transfer \$200,000 from General Fund Contingencies to the County Executive's Office to fund the ITC consultant contract.

(4/5<sup>th</sup> vote)

**Executive Summary:**

This item requests the Board approve two contracts that enable the County to continue delivering regionally supported energy-efficiency and decarbonization programs and secure available federal clean-energy incentives for eligible projects currently being implemented.

Staff requests the Board authorize the County Executive or designee to execute an agreement with the Sonoma County Regional Climate Protection Authority for the County's ongoing participation in the Bay Area Regional Energy Network (BayREN), a nine-county collaboration that delivers residential, multifamily, commercial, and public-sector energy programs.

Staff also requests the Board authorize the County Executive to execute an agreement with Plante Moran and approve the use of \$200,000 from General Fund Contingencies to fund this agreement, to manage the County's Investment Tax Credit (ITC) filings under the Inflation Reduction Act (IRA).

**Discussion:**

**BayREN Program Delivery and SCTCA Agreement**

BayREN is a regional collaboration among nine Bay Area counties that delivers energy-efficiency, electrification, and decarbonization programs supporting local and state climate mandates. Sonoma County has served as a BayREN program implementer since 2019 through annual agreements with the Sonoma County Regional Climate Protection Authority.

The proposed new agreement will fund 0.70 FTEs of County staff time in the County Executive's Office Energy and Sustainability (E&S) team to deliver BayREN programs through December 31, 2027. Services include:

- Single-Family Home Programs: Rebates and technical assistance for insulation, HVAC upgrades, and electrification.
- Multifamily Building Assistance: Whole-building assessments, incentives, and technical support.
- Green Labeling & Home Energy Score: Tools and training for homeowners and real-estate professionals.
- Codes & Standards Support: Training and technical resources for local building departments.
- Public-Sector Electrification & Decarbonization: Planning and technical expertise to reduce fossil-fuel use in public buildings.

Through BayREN, the County has secured \$283,898.01 in funding through CY2027 for staffing and program implementation. No General Fund resources are required for BayREN participation. The BayREN contract has a two-year contract term and is based on the calendar year, from January 2026 through December 2027.

#### **Consultant Support for Federal Incentive Filings**

The Inflation Reduction Act (IRA) provides substantial financial incentives for public-sector clean-energy, electrification, and resiliency projects, including direct-pay Investment Tax Credits (ITCs). These incentives can significantly reduce project costs, but the filing process requires specialized expertise and strict compliance with federal guidance.

The County has implemented several projects that are eligible for these tax credit incentives. The known projects include:

- Santa Rosa Veterans Hall Solar PV
- Santa Rosa Veterans Hall BESS
- County Campus Solar PV
- County Admin Center BESS
- Los Guillicos BESS
- Public Health Lab Solar PV
- Public Health Lab BESS

In addition to the above projects, electric vehicle (EV) purchase and EV chargers and infrastructure installation also qualify for the credits. Staff is working with County departments and agencies to determine if there are other projects that may be eligible for the tax credit.

Based on initial estimates, the County could receive approximately \$6.5M in federal tax credits. \$5.5M in credits has been assumed and earmarked for debt service for the Santa Rosa Vets Hall projects, and the Sustainable Solutions Turnkey (SST) solar PV and BESS projects on the County Campus and Los Guillicos.

To ensure the County maximizes eligible ITC reimbursement and meets all federal requirements, staff issued a

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**Agenda Date:** 12/16/2025

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Request for Proposals (RFP) to secure a consultant with experience in IRA tax-credit preparation and documentation. The RFP was issued on September 15, 2025 and closed on October 6, 2025. Three proposals were received and reviewed by Energy and Sustainability staff. Plante Moran (PM) was selected because the firm received the highest overall evaluation score, demonstrating the strongest performance across all weighted criteria. The firm showed exceptional capability, high-quality references, and competitive cost relative to the scope of services. PM also met both preference criteria, further solidifying its position as the most advantageous choice for the County. The consultant will support:

- Preparation and submission of ITC paperwork;
- Eligibility verification and documentation management;
- Cross-departmental coordination to gather accurate project data;
- Strategic planning to optimize credit value across projects.

The consultant will assist the County in identifying all current and future projects eligible for IRA clean-energy tax credits, developing project-specific workplans, and establishing timelines for required filings. This includes confirming eligibility, performing cost segregation, calculating available credits and bonuses, and preparing all compliance documentation and federal filings for both placed-in-service and upcoming projects. The consultant will provide training to County staff on tax credit requirements, processes, and project-tracking methods, enabling staff to take ownership of portions of the work that do not require specialized expertise while still supporting ongoing and future filings.

Filing for Investment Tax Credits (ITCs) is a new responsibility for the County and was not included in the FY 2025-26 Adopted Budget, as this work has not historically been part of the County's staff work plan. The County currently has multiple projects eligible for these credits, including two projects whose debt-service calculations rely on the successful receipt of ITCs. To ensure the County can secure these critical credits and meet project financing requirements, a budget adjustment transferring \$200,000 from General Fund Contingencies to the County Executive's Office is needed to fund the necessary consultant support.

**Strategic Plan:**

This item directly supports the County's Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

**Pillar:** Climate Action and Resiliency

**Goal:** Goal 1: Continue to invest in wildfire preparedness and resiliency strategies

**Objective:** Objective 1: Provide educational resources to the community that promote and facilitate carbon neutral and fire hardening construction for new and existing homes.

**Pillar:** Resilient Infrastructure

**Goal:** Goal 3: Make all County facilities carbon free, zero waste and resilient

**Objective:** Objective 3: Invest in County owned facilities, establishing carbon eliminating microgrid technology and improving energy grid resilience to reduce the impact of power loss during power shutdowns and natural disasters (floods, fires, earthquakes), priorities

**Racial Equity:**

N/A

**Was this item identified as an opportunity to apply the Racial Equity Toolkit?**

No

**Prior Board Actions:**

8/13/2024 - Board approved the Comprehensive Energy Resiliency Project which identified the ITC within the fiscal calculations for the project. [Link to Board Item 8.13.24 <https://sonoma-county.legistar.com/MeetingDetail.aspx?ID=1144496&GUID=D0EABDE3-EEDD-4191-9361-455DA2CE348D&Options=info|&Search=>](https://sonoma-county.legistar.com/MeetingDetail.aspx?ID=1144496&GUID=D0EABDE3-EEDD-4191-9361-455DA2CE348D&Options=info|&Search=>)

3/6/2024 - Board approved Professional Services Agreement with Regional Climate Protection Authority and the County of Sonoma for implementation and marketing energy efficiency sustainability programs in the amount of \$628,025

8/22/2023 - Board approved the energy and resiliency upgrades to the Santa Rosa Veterans Memorial Building using the Pacific Gas and Electric Company’s Sustainable Solutions Turnkey Program which identified the ITC within the fiscal calculations for the project. [Link to Board Item 8.22.23 <https://sonoma-county.legistar.com/MeetingDetail.aspx?ID=1053822&GUID=A932D765-8366-42B5-82C9-9ACEDA20E3B4&Options=info|&Search=>](https://sonoma-county.legistar.com/MeetingDetail.aspx?ID=1053822&GUID=A932D765-8366-42B5-82C9-9ACEDA20E3B4&Options=info|&Search=>)

4/5/2022 - Board approved Professional Services Agreement with Regional Climate Protection Authority and the County of Sonoma for implementation and marketing energy efficiency sustainability programs in the amount of \$168,092.

3/2/2021 - Board approved Professional Services Agreement with Regional Climate Protection Authority and the County of Sonoma for implementation and marketing energy efficiency and sustainability programs in the amount of \$168,092.

5/12/2020 - Board approved Professional Services Agreement with Regional Climate Protection Authority and the County of Sonoma for implementation and marketing energy efficiency and sustainability programs in the amount of \$168,092.

2/26/2019 - Board approved Professional Services Agreement with Regional Climate Protection Authority and the County of Sonoma for implementation and marketing energy efficiency and sustainability programs in the amount of \$95,969.

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY25-26 Adopted</b>	<b>FY26-27 Projected</b>	<b>FY27-28 Projected</b>
Budgeted Expenses	\$70,975	\$141,949	\$70,975
Additional Appropriation Requested	\$200,000		
<b>Total Expenditures</b>	<b>\$270,975</b>	<b>\$141,949</b>	<b>\$70,975</b>
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other	\$70,975	\$141,949	\$70,975

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Use of Fund Balance			
General Fund Contingencies	\$200,000		
<b>Total Sources</b>	<b>\$270,975</b>	<b>\$141,949</b>	<b>\$70,975</b>

**Narrative Explanation of Fiscal Impacts:**

The BayREN contract spans FY 25/26 through FY 27/28 and the revenues and expenses are reflected above. Additionally, staff requests \$200,000 from General Fund Contingencies for a consultant to prepare and submit the investment tax credit filings. Tax credits remaining after those committed to debt service would reimburse the General Fund. The necessary budget adjustments to process the ITC reimbursement for eligible projects and consultant costs will be included in future consolidated budget adjustments or in a future year recommended budget.

<b>Staffing Impacts:</b>			
<b>Position Title (Payroll Classification)</b>	<b>Monthly Salary Range (A-I Step)</b>	<b>Additions (Number)</b>	<b>Deletions (Number)</b>
N/A			

**Narrative Explanation of Staffing Impacts (If Required):**

N/A

**Attachments:**

- 2. Final BayREN-PSA\_2026-2027
- 3. DRAFT PSA\_ITC Services
- 4. Budget Resolution

**Related Items "On File" with the Clerk of the Board:**

N/A