

**Funding and Implementation Agreement for 2024-2027**  
**Bay Area Regional Energy Network (BayREN) Program Implementation Plan**  
**Between Association of Bay Area Governments and County of San Mateo**

- A. Parties:** The parties to this Agreement (Agreement) are the Association of Bay Area Governments (ABAG), whose address is 375 Beale Street, Suite 800, San Francisco, CA 94105, and County of San Mateo (BayREN Member Agency), whose address is 455 County Center 4th Floor, Redwood City, CA 94063.
- B. BayREN:** The San Francisco Bay Area Regional Energy Network (BayREN) consists of ten (10) public entities:
- a. Association of Bay Area Governments (ABAG)
  - b. Energy Council (StopWaste), on behalf of Alameda County jurisdictions
  - c. County of Contra Costa (Contra Costa)
  - d. County of Marin (Marin)
  - e. County of Napa (Napa)
  - f. City and County of San Francisco (SF)
  - g. County of San Mateo (San Mateo)
  - h. County of Santa Clara (Santa Clara)
  - i. County of Solano (Solano)
  - j. Regional Climate Protection Authority (RCPA), on behalf of Sonoma County jurisdictions

These entities are referenced collectively or generically as “Members” or “Member Agencies”. The members have entered into a Restated and Revised Memorandum of Understanding dated January 7, 2015, with regards to the San Francisco Bay Area Regional Energy Network (“Revised and Restated MOU”).

- C. California Public Utilities Commission (CPUC) Decision:** On July 3, 2023, the CPUC issued Decision (D.) 23-06-055 (“Portfolio Application Decision”) approving, among other things, budget to fund BayREN’s proposed implementation activities through December 31, 2027.<sup>1</sup>
- D. ABAG-Pacific Gas and Electric Company (PG&E) Funding Agreement:** ABAG, as the program administrator of BayREN, and Pacific Gas and Electric Company (PG&E), as BayREN’s fiscal agent, have entered into a contract to provide funding for the implementation activities approved by CPUC D. 23-06-055. The agreement is denominated under PG&E’s nomenclature as Change Order 3 to Contract Work Authorization (CWA) C21158, which provides funding from January 1, 2024, to December 31, 2027, issued under and pursuant to Master Service Agreement C657.<sup>2</sup>

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<sup>1</sup> <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M512/K907/512907396.PDF>; Page 93

<sup>2</sup> [URL to be added when agreement is available]

- E. ABAG-MTC Contract for Services:** ABAG and the Metropolitan Transportation Commission (MTC) entered into a Contract for Services under which MTC provides administrative and program services to ABAG. Effective July 1, 2017, the staffs of ABAG and MTC were consolidated. MTC staff now serve both the ABAG and the MTC. As such, all interactions between ABAG and BayREN Member Agency contained within this Agreement, shall be conducted by MTC staff on behalf of ABAG;

## **Terms and Conditions**

### **1. Definitions:**

**Allocated Budget** – The funds that are allocated to BayREN Member Agency for implementing the Assigned SOW in this Agreement as may be modified from time to time under this Agreement.

**Assigned Scope of Work (SOW)** – The tasks and requirements of the PIP that are assigned to BayREN Member Agency through this Agreement as may be modified from time to time as allowed under this Agreement.

**BayREN Administrator** – The Member Agency that has been elected by the Coordinating Circle to provide overall BayREN administration.

**BayREN Member Agency** – The counterparty to this agreement.

**Coordinating Circle** – A group comprised of one voting representative from each Member Agency. The Coordinating Circle supervises all subprogram activities and may take action by a majority vote of those present at a meeting.

**County Lead or ABAG Lead** – The voting representative from a Member Agency that serves on the Coordinating Circle.

**Incentives** – The funds available to pay property owners or contractors upon successful completion of an approved energy efficiency project that meets the requirements of the PIP.

**Member or Member Agency** means any of the ten public entities that are signatories to the Revised and Restated MOU.

**PIP** means **Program Implementation Plan** and is also referred to as **Implementation Plan**, or **IP**.

**Program Circle** – A group of individuals serving as a committee to provide feedback and coordinate activities for the subprogram.

**Program Lead** – The individual that has been elected by the Coordinating Circle to lead a specific BayREN subprogram. Each Program Lead generally supervises Program Circle.

**Revolving Loans** – Funds available as loans to property owners to be used to pay for approved energy efficiency retrofits, and then repaid to ABAG to make subsequent loans pursuant to the PIP.

**Steward** – The individual elected by the Program Circle that channels tensions within the subprogram.

**Tensions** – Anything that a Member perceives as preventing the program(s) from moving forward.

**2. PIP Implementation:** All Members, including BayREN Member Agency, agree that the primary purpose of this Agreement is to successfully implement the PIP that the coordinated and collaborative process set forth in the Restated and Revised MOU, executed by all BayREN Members in 2015, is the agreed upon means for the Members to do so and that strategic management of the implementation is a critical part of the approach.

- (a) The Members, including BayREN Member Agency, have agreed on the initial overall assignment of tasks and requirements of the PIP, and the allocation of the associated funding, to individual Members including BayREN Member Agency, set forth in Attachment 1 – BayREN Portfolio Budget.
- (b) The Members, including BayREN Member Agency, have agreed on the initial assignment of tasks and requirements for individual programs in all the SOWs, and the allocation of the associated funding, to individual Members. BayREN Member Agency has been assigned tasks, requirements, and budgets for a particular program. An attachment describing the corresponding scope of work and budget is attached to this Agreement and numbered as follows:
  - (1) Attachment 1A – Portfolio Administration Scope of Work and Budget,
  - (2) Attachment 1B – Single Family Scope of Work and Budget,
  - (3) Attachment 1C – Green Labeling Scope of Work and Budget,
  - (4) Attachment 1D – Multifamily Scope of Work and Budget,
  - (5) Attachment 1E – BayREN Business Scope of Work and Budget,
  - (6) Attachment 1F – BayREN Refrigerant Replacement Services Scope of Work and Budget,
  - (7) Attachment 1G – Integrated Energy Services Scope of Work and Budget,
  - (8) Attachment 1H – Targeted Decarbonization Services Scope of Work and Budget,
  - (9) Attachment 1I – Water Upgrades Save Scope of Work and Budget,
  - (10) Attachment 1J – Climate Careers Scope of Work and Budget,
  - (11) Attachment 1K – Codes and Standards Scope of Work and Budget,
- (c) The maximum hourly rates for each labor category for BayREN Member Agency’s employees performing under this Agreement are set forth in Attachment 2 – Maximum Billing Rates. BayREN Member Agency may invoice for the actual employee hours expended in performing under this Agreement at an hourly rate up to the maximum rate.
- (d) BayREN Member Agency acknowledges that:
  - (1) Other Members, except ABAG, are third party beneficiaries of this Agreement;
  - (2) ABAG and each of the other Members will enter into an agreement comparable to this Agreement whereby each other Member, including ABAG, will accept the initial assignment of tasks and requirements of the PIP and the associated allocation of funding set forth in Attachment 1 – BayREN Portfolio Budget and Attachment 1A through Attachment 1K, if any.

- (e) BayREN Member Agency is a signatory to the Restated and Revised MOU. BayREN Member Agency intends to participate in the activities conducted under the Restated and Revised MOU throughout the term of this Agreement.

### **3. Maximum Budget and Allocated Budget:**

- (a) The Allocated Budget for BayREN Member Agency is one million two hundred seventy-eight thousand nine hundred fifty-seven dollars (\$1,278,957), as described in Attachment 1 – BayREN Portfolio Budget and contingent upon annual approval of the ABAG Budget and Work Program.

BayREN Member Agency may, with prior written approval from BayREN Administrator, shift budget among program and subprogram totals within the same calendar year, so long as the contract total remains unchanged.

### **4. Reimbursement Process:**

- (a) ABAG will reimburse BayREN Member Agency based on time expended in implementing the SOWs. The amount of the reimbursement will be based on the invoices submitted by BayREN Member Agency. BayREN Member Agency will not charge, and ABAG will not pay, any additional sums for work performed, except for allowed reimbursable costs.
- (b) BayREN Member Agency will be paid in arrears, based upon invoices submitted by BayREN Member Agency to ABAG. ABAG will promptly review BayREN Member Agency's invoices, approve or disapprove them for payment. ABAG will pay BayREN Member Agency within thirty (30) working days after receipt of the invoice. Each invoice shall specify the hourly rates for the individuals, or categories of individuals, as the case may be, that are listed in Attachment 2 – Maximum Billing Rates. The invoice will separately itemize reimbursable costs and other allowable charges with supporting documentation attached. A written narrative describing the work performed and deliverables completed (if any), in an agreed upon format, shall accompany the invoice.

All invoices, supporting documentation, and narratives shall be submitted electronically to BayREN's SharePoint website<sup>3</sup> and/or via email to ABAG at [acctpay@bayareametro.gov](mailto:acctpay@bayareametro.gov).

**5. Assurances and Warranties Regarding Implementation of PIP:** BayREN Member Agency acknowledges that under the ABAG-PG&E Funding Agreement, ABAG provided PG&E certain assurances and warranties regarding implementation of the PIP and that such assurance and warranties rest upon the actions of individual Members' implementation of their assigned tasks and requirements. BayREN Member Agency acknowledges that ABAG entered into the ABAG-PG&E Funding Agreement and this Agreement and that each of the Members entered into an agreement comparable to this Agreement in reliance on BayREN Member Agency's representations and warranties.

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<sup>3</sup> <https://bayareametro.sharepoint.com/sites/bayren/SitePages/BayREN-Invoices.aspx>

- (a) BayREN Member Agency represents and warrants to each of the other Members, including ABAG, that it will implement, or cause to be implemented, the SOWs in conformity with the relevant CPUC Decisions and all applicable Federal, State, and local statutes, regulations and administrative decisions, rulings and guidelines.
- (b) BayREN Member Agency warrants to each of the other Members, including ABAG, that it will implement, or cause to be implemented, the SOW with the degree of skill and care that is required by current, good and sound professional procedures and practices, and in conformance with generally accepted professional standards prevailing at the time the SOW is implemented so as to ensure that the services performed are correct and appropriate for the purposes contemplated in this Agreement and related specifications.

**6. Infringement Protection:** BayREN Member Agency represents to each of the other Members, including ABAG, that the material to be prepared under this Agreement will not infringe upon the copyright, patent or license, or otherwise violate the proprietary rights, including trade secret rights, of any person or entity. BayREN Member Agency agrees to indemnify and hold each of the other Members, the CPUC and PG&E (for the purposes of this section only, Indemnitees) harmless from and against any and all liabilities, costs and damages arising out of any such infringement, and from any suit, demand or claim made against Indemnitees alleging any such infringement or violation. In addition to the foregoing, if there is such a suit, demand or claim, BayREN Member Agency agrees, as soon as possible, to either procure for the affected Indemnitee(s) the right to continue using the material, replace the material with non-infringing material or modify it so it becomes noninfringing; provided, however that the replaced or modified material shall be equal to that contracted for hereunder and satisfactory to the affected Indemnitee(s). BayREN Member Agency further agrees to pay any judgment or reasonable settlement offer resulting from a suit, demand or claim.

**7. Indemnification:** All Members, including BayREN Member Agency, acknowledge that under the ABAG-PG&E Funding Agreement ABAG has agreed, on behalf of the Members, to indemnify, hold harmless and defend the CPUC and PG&E. In recognition of this obligation, BayREN Member Agency shall indemnify, hold harmless and defend ABAG, the CPUC, PG&E and their respective members, affiliates, subsidiaries, parent company, commissioners, officers, managers, directors, agents, and employees (for the purposes of this section only, Indemnitees), from and against all claims, demands, losses, damages, costs, expenses, and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any:

- (a) injury to or death of persons
- (b) injury to property;
- (c) violation of local, state, or federal common law, statute or regulation, including but not limited to environmental laws or regulations;
- (d) strict liability imposed by any law or regulation;

so long as such injury, violation, or strict liability (as set forth in subsections (a) - (d) above) arises from BayREN Member Agency's performance of, or failure to perform, this Agreement, however caused excepting only such loss, damage, cost, expense, liability, strict liability, or violation of law or regulation that is caused by the sole negligence or willful misconduct of the Indemnitees.

**8. Term and Termination:** This Agreement commences on January 1, 2024, and terminates effective December 31, 2027, or the date the ABAG-PG&E Funding Agreement is terminated, whichever occurs earlier.

**9. Records/Audit:** BayREN Member Agency shall keep complete and accurate books and records of all financial aspects of its relationship with ABAG in accordance with generally-accepted accounting principles. BayREN Member Agency shall permit authorized representatives of ABAG and/or PG&E or the CPUC and its agents, to inspect, copy, and audit all data and records of BayREN Member Agency relating to its performance of services under this Agreement. BayREN Member Agency shall maintain all such data and records in accordance with the requirement of the ABAG-PG&E Funding Agreement.

**10. Data to be Furnished by ABAG:** All data, reports, surveys, studies, drawings, software (object or source code), electronic databases, and any other information, documents or materials ("ABAG Data") made available to BayREN Member Agency by ABAG for use by BayREN Member Agency in the performance of its services under this Agreement shall remain the property of ABAG and shall be returned to ABAG at the completion or termination of this Agreement. No license to such ABAG Data, outside of the Scope of Work of the Project, is conferred or implied by BayREN Member Agency's use or possession of such ABAG Data.

**11. Headings:** The descriptive headings used in this Agreement are for convenience only and shall not control or affect the meaning or construction of any of its provisions.

**12. Governing Law:** This Agreement will be construed and enforced in accordance with the laws of the State of California.

**13. Severability:** Should any part of this Agreement be declared unconstitutional, invalid, or beyond the authority of either party to enter into or carry out, such decision shall not affect the validity of the remainder of this Agreement, which shall continue in full force and effect; provided that, the remainder of this Agreement can, absent the excised portion, be reasonably interpreted to give effect to the intentions of the parties.

IN WITNESS WHEREOF, BayREN Member Agency has duly executed this Agreement, or caused it to be duly executed, and ABAG has duly executed this Agreement, or caused it to be duly executed.

ASSOCIATION OF BAY AREA  
GOVERNMENTS

COUNTY OF SAN MATEO  
A Political Subdivision of the State of  
California

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Andrew B. Fremier  
Metropolitan Transportation Commission  
Executive Director, Acting Pursuant to the  
Contract for Services dated May 30, 2017

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Dave Pine  
President, Board of Supervisors, San Mateo  
County

**Attachment 1 – BayREN Portfolio Budget**

Attachment	Subprogram	Budget Category	2024	2025	2026	2027	Contract Total
<a href="#">1A</a>	-	Portfolio Administration	\$7,397	\$7,620	\$7,848	\$6,996	\$29,861
<a href="#">1B</a>	BayREN Single Family	Administration	\$8,667	\$8,927	\$9,195	\$9,381	\$36,169
		Implementation	-	-	-	-	-
		Marketing	\$88,728	\$91,390	\$93,698	\$96,509	\$370,325
		Incentives	-	-	-	-	-
		Subtotal	\$97,395	\$100,317	\$102,893	\$105,890	\$406,494
<a href="#">1C</a>	BayREN Green Labeling	Administration	\$1,131	\$1,165	\$1,200	\$605	\$4,101
		Implementation	\$10,000	\$10,000	-	-	\$20,000
		Marketing	\$36,595	\$37,693	\$20,000	\$20,000	\$114,288
		Incentives	-	-	-	-	-
		Subtotal	\$47,726	\$48,858	\$21,200	\$20,605	\$138,389
<a href="#">1D</a>	BayREN Multifamily	Administration	\$2,055	\$2,118	\$2,181	\$441	\$6,794
		Implementation	-	-	-	-	-
		Marketing	\$29,615	\$32,003	\$20,000	\$21,000	\$102,618
		Incentives	-	-	-	-	-
		Subtotal	\$31,670	\$34,121	\$22,181	\$21,441	\$109,412
<a href="#">1E</a>	BayREN Business	Administration	\$863	\$889	\$916	\$943	\$3,611
		Implementation	-	-	-	-	-
		Marketing	\$7,653	\$7,974	\$28,148	\$28,992	\$72,767
		Incentives	-	-	-	-	-
		Subtotal	\$8,516	\$8,863	\$29,064	\$29,935	\$76,378
<a href="#">1F</a>	BayREN Business Refrigerant Replacement	Administration	\$863	\$889	\$916	\$943	\$3,611
		Implementation	-	-	-	-	-
		Marketing	\$8,112	\$8,448	\$28,635	\$29,480	\$74,675
		Incentives	-	-	-	-	-
		Subtotal	\$8,975	\$9,337	\$29,551	\$30,423	\$78,286
<a href="#">1G</a>	BayREN Integrated Energy Services	Administration	863	889	916	\$943	\$3,611
		Implementation	3,739	3,851	3,966	4,086	\$15,642
		Marketing	5,608	5,777	1,460	1,504	\$14,349
		Incentives	-	-	-	-	-
		Subtotal	10,210	10,517	6,342	6,533	\$33,602
<a href="#">1H</a>	BayREN Targeted Decarbonization Services	Administration	\$863	\$889	\$916	943	\$3,611
		Implementation	\$1,402	\$1,444	\$1,487	\$1,532	\$5,865
		Marketing	\$7,945	\$8,184	\$7,307	\$7,526	\$30,962
		Incentives	-	-	-	-	-
		Subtotal	\$10,210	\$10,517	\$9,710	\$10,001	\$40,438
<a href="#">1I</a>	BayREN Water Upgrades Save	Administration	\$123	\$127	\$130	\$134	\$515
		Implementation	\$2,662	\$2,742	\$4,127	\$4,250	\$13,781
		Marketing	-	-	-	-	-
		Incentives	-	-	-	-	-
		Subtotal	\$2,785	\$2,869	\$4,257	\$4,384	\$14,296
<a href="#">1J</a>	BayREN Codes & Standards	Administration	\$1,400	\$1,442	\$1,485	\$1,530	\$5,857
		Implementation	\$74,182	\$76,407	\$22,992	\$23,682	\$197,263
		Marketing	-	-	-	-	-
		Incentives	-	-	-	-	-
		Subtotal	\$75,582	\$77,849	\$24,477	\$25,212	\$203,120
<a href="#">1K</a>	BayREN Workforce Education & Training	Administration	\$432	\$445	\$459	\$462	\$1,798
		Implementation	-	-	-	-	-
		Marketing	\$35,198	\$36,254	\$37,160	\$38,275	\$146,887
		Incentives	-	-	-	-	-
		Subtotal	\$35,630	\$36,699	\$37,619	\$38,737	\$148,685
		<b>Annual Total:</b>	<b>\$336,096</b>	<b>\$347,566</b>	<b>\$295,139</b>	<b>\$300,156</b>	<b>\$1,278,957</b>



## **Attachment 1A - Portfolio Administration**

### **Scope of Work**

BayREN Member Agencies will provide services in their jurisdictions to support the BayREN portfolio. These tasks include participating in general coordination meetings and activities, performing contract management, invoicing, and reporting functions, and other activities that provide portfolio-level benefits and cannot be reasonably attributed to a single program.

#### **Admin - County Lead for BayREN Member Agency**

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
- Coordinating with local PG&E energy efficiency programs, applicable CCA/CCE programs, and other BayREN Member Agency programs.
- Implementing BayREN communication strategies in BayREN Member Agency
- Sharing progress, performance, and strategic data and information with the Coordinating Circle
- 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
- Managing the county's BayREN contract, budget and relationships with elected and appointed officials
- 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
- Reviewing holacracy governance documents in advance of Coordinating Circle meetings in order to effectively participate in governance processes
- Participating in BayREN-wide committees, retreats, and other activities

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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.
- 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 local cities, 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
- Sharing with the Single-Family Coordinating Circle Program marketing material developed by the County

## **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 (HES) 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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 Real Estate Education Pilot (2024 & 2025)**

Purpose: Pilot to develop and offer San Mateo County-specific real estate training.

Accountabilities:

- Working with Green Labeling lead and Franklin Energy to develop San Mateo County-specific real estate training
- Coordinating training details, including location

- Conduction outreach for training
- Evaluating success of pilot and how it could be replicated by other jurisdictions

### **Marketing & Outreach – Local Outreach for BayREN Member Agency**

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
- 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

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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 cities within the County, Energy Watch/Local Government Partnership, CCAs, Munis and other local programs
- 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
- Working with local jurisdictions to distribute case study content through available media (press releases, websites, newsletters, social media, etc.)
- Distributing program impact data to jurisdictions within the member county

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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 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.
- Coordinating with towns, cities and unincorporated areas within the County, Energy Watch/Local Government Partnership, and other local programs
- Coordinating and partnering with department and agencies to uncover efficiencies in marketing, such as including a BayREN commercial flier with each newly issued Business License, etc.
- 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.)

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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.
- Coordinating with towns, cities and unincorporated areas within the County, Energy Watch/Local Government Partnership, and other local programs
- Coordinating and partnering with department and agencies to uncover efficiencies in marketing, such as including a BayREN commercial flier with each newly issued Business License, etc.
- 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.)

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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 BayREN Member Agency**

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

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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 BayREN Member Agency**

Purpose: Encourage participation in Targeted Decarbonization Services Program activities.

Role Accountabilities:

- Aiding in the development of marketing strategies, messaging, and collateral as needed
- 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

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 Outreach for BayREN Member Agency**

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
- 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
- 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

### **Implementation – Codes Committee Secretary**

Purpose: Support C&S program administration.

Role Accountabilities:

- Drafting minutes for Codes & Standards Committee calls and meetings to create a record of discussions and decisions for use by committee members and other BayREN members

### **Implementation – Streamlined Permitting (Codes Project 2024-2025)**

Purpose: Develop an improved and more consistent approach to permitting.

Role Accountabilities:

- Developing a standard submittal package for permitting electrification projects
- Working with County staff to implement the approach in the county as a pilot
- Encouraging a consistent approach in other cities within the county
- Collaborating with other BayREN counties working on similar efforts
- Providing an annual report and annual presentation to a BayREN committee

### **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 San Mateo 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 – Forum Planning Committee**

Purpose: Prioritize, design, and deliver high quality regional meetings addressing the most pressing energy topics for local governments.

Role Accountabilities:

- Leading efforts to organize one of the Codes & Standards Forums
- Securing speakers and content to present appropriate and compelling information
- Providing input to ensure events are not duplicative of events hosted by other groups
- Assisting with outreach as needed, including working with consultants to develop meeting-specific invitation lists for target audiences
- Providing support and assistance at Forum events as needed
- Developing and maintaining an energy topic list for future Forum events

### **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 – 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

## **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 for BayREN Member Agency**

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 BayREN Member Agency
- 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 BayREN Member Agency**

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.

**Attachment 2 – Maximum Billing Rates\***  
**County of San Mateo**  
**January 1, 2024, to December 31, 2027**

<b>Staff Category</b>	<b>Hourly Labor rate</b>
Program Manager	\$173.46
Senior Sustainability Specialist	\$162.06
Resource Conservation Specialist III	\$147.84
Resource Conservation Specialist II	\$138.89
Resource Conservation Specialist I	\$131.70
Intern/Fellow IV	\$128.85
Intern/Fellow III	\$112.43
Intern/Fellow II	\$97.21
Intern/Fellow I	\$88.13

\* These are maximum billing rates. Actual fully loaded rates including salary, benefits and overhead will be calculated monthly to bill staff time.