

**Regular Meeting of the Board of Directors of the
Peninsula Clean Energy Authority (PCEA)
AGENDA**

**Thursday, September 25, 2025
6:30 pm**

PLEASE NOTE: This meeting will be held in a hybrid format with both in-person and Zoom participation options for members of the public; Board members shall appear in person.

In-Person Meeting Locations:

PCEA Lobby, **2075 Woodside Road, Redwood City, CA 94061**
Los Banos City Hall, Conference Room A, **520 J Street, Los Banos, CA 93635**

Zoom, **Virtual Meeting Link:** <https://pencleanenergy.zoom.us/j/87496649657>
Meeting ID: 874-9664-9657 **Passcode:** 2075 **Phone:** +1 (669) 444-9171

This meeting of the Board of Directors will be held at the Peninsula Clean Energy Lobby: 2075 Woodside Road, Redwood City, CA 94061 and Los Banos City Hall, Conference Room A, 520 J Street, Los Banos, CA 93635 and by teleconference pursuant to California Assembly Bill 2449 and the Ralph M. Brown Act, CA Gov't Code. Section 54950, et seq. **Members of the Board are expected to attend the meeting in person** and should reach out to General Counsel for Peninsula Clean Energy, Jennifer Stalzer, with questions or accommodation information (jstalzer@smcgov.org). For information regarding how to participate in the meeting remotely, please refer to the instructions at the end of the agenda. In addition, a video broadcast of the meeting can be viewed at <https://www.peninsulacleanenergy.com/meetings-events> following the meeting.

Public Participation

The PCEA Board meeting may be accessed through Zoom online at <https://pencleanenergy.zoom.us/j/87496649657>. The webinar ID is: 874-9664-9657 and the passcode is 2075. The meeting may also be accessed via telephone by dialing +1(669) 444-9171. Enter the webinar ID: 874-9664-9657, then press #. (Find your local number: <https://pencleanenergy.zoom.us/u/kTIH1Ocod>). Peninsula Clean Energy uses best efforts to ensure audio and visual clarity and connectivity. However, it cannot guarantee the connection quality.

Members of the public can also attend this meeting physically at the **Peninsula Clean Energy Lobby** at 2075 Woodside Road, Redwood City, CA 94061 or **Los Banos City Hall**, Conference Room A, 520 J Street, Los Banos, CA 93635.

Written public comments may be emailed to PCEA Board Clerk, Nelly Wogberg (nwogberg@peninsulacleanenergy.com) and such written comments should indicate the specific agenda item on which the member of the public is commenting.

Spoken public comments will be accepted during the meeting in the Board Room(s) or remotely through Zoom at the option of the speaker. Please use the "Raise Your Hand" function in the Zoom platform, or press *6 if you phoned into the meeting, to indicate that you would like to provide comment.

Please note that Peninsula Clean Energy Board of Directors meetings are a limited public forum, and all public comment must relate to something that is within the subject matter jurisdiction of the Board. If comments do not relate to the subject matter jurisdiction of the Board, we will stop the comment and move on to the next speaker. General Counsel will assist in identifying comments that are not related to the subject matter jurisdiction of the Board.

ADA Requests

Individuals who require special assistance or a disability related modification or accommodation to participate in this meeting, or who have a disability and wish to request an alternative format for the meeting, should contact Nelly Wogberg, Board Clerk, by 10:00 a.m. on the day before the meeting at (nwogberg@peninsulacleanenergy.com). Notification in advance of the meeting will enable PCEA to make reasonable arrangements to ensure accessibility to this meeting, the materials related to it, and your ability to comment.

Closed Captioning is available for all PCEA Board meetings. While watching the video broadcast in Zoom, please enable captioning.

CALL TO ORDER / ROLL CALL / APPROVE TELECONFERENCE PARTICIPATION UNDER AB 2449

This item is reserved to approve teleconference participation request for this meeting by Director pursuant to Brown Act revisions of AB 2449 due to an emergency circumstance to be briefly described.

PUBLIC COMMENT

This item is reserved for persons wishing to address the Board on any PCEA-related matters that are not otherwise on this meeting agenda. Public comments on matters listed on the agenda shall be heard at the time the matter is called. Members of the public who wish to address the Board are customarily limited to two minutes per speaker. The Board Chair may increase or decrease the time allotted to each speaker.

ACTION TO SET AGENDA AND TO APPROVE CONSENT AGENDA ITEMS

1. [Acceptance of Diversity, Equity, Accessibility, and Inclusion \(DEAI\) Annual Report for 2025 and Approval of a Resolution to Transition the Remaining and Ongoing DEAI Action Plan Items into PCE's Strategic Plan for 2026-2030](#)
2. [Approval of Proposed Reduction to the ECO100 Rate](#)
3. [Approval of Amendments to the Zero-Carbon Intensity Low Carbon Fuel Standard Tariff](#)
4. [Approval of Amendments to the Records Retention Policy 20\(d\)](#)
5. [Approval of Minutes from the July 24, 2025 Board of Directors Meeting](#)

REGULAR AGENDA

6. Chair Report (Discussion)
7. [CEO Report \(Discussion\)](#)
8. Community Advisory Committee Report (Discussion)
9. [Update on Legislative Activities \(Discussion\)](#)
10. [Discussion on Peninsula Clean Energy AI Chatbot: A New Tool for Customers \(Discussion\)](#)

11. [Update on 2025 Reach Codes \(Discussion\)](#)
12. [Update on Brand Strategy and Naming Exploration \(Discussion\)](#)
13. [2020-2025 Strategic Plan Review of Accomplishments and Close Out \(Discussion\)](#)
14. Board Members' Reports (Discussion)

INFORMATIONAL REPORTS

15. [Account Services Quarterly Update](#)
16. [Data and Technology Department Quarterly Update](#)
17. [Energy Supply Procurement Quarterly Update](#)
18. [Regulatory Policy Team Quarterly Update](#)
19. [Acronym List](#)
20. [Report on California Community Power \(CCP\) Joint Powers Authority](#)
21. [Social Media FAQ's](#)

ADJOURNMENT

Public records that relate to any item on the open session agenda are available for public inspection. The records are available at the Peninsula Clean Energy offices or on PCEA Website at: <https://www.peninsulacleanenergy.com>.

Instructions for Joining a Zoom Meeting via Computer or Phone

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- Please mute your microphone when you are not speaking to minimize audio feedback
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Options for Joining

- Videoconference with Computer Audio - see Option 1 below
- Videoconference with Phone Call Audio - see Option 2 below
- Calling in via Telephone/Landline - see Option 3 below

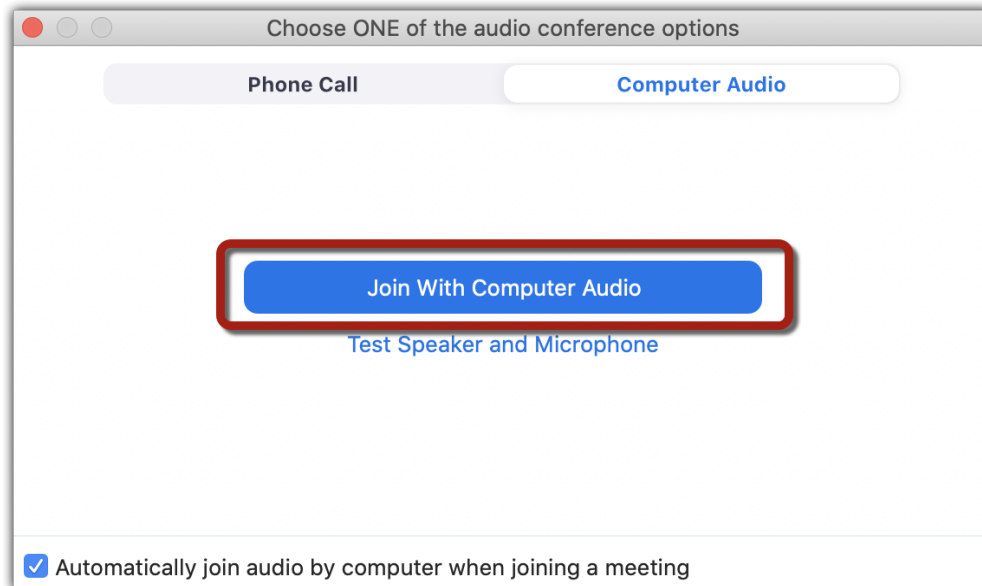
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- After the application opens, the pop-up screen below will appear asking you to choose ONE of the audio conference options. Click on the Computer Audio option at the top of the pop-up screen.



- Click the blue, "Join with Computer Audio" button.
- In order to enable video, click on "Start Video" in the bottom left-hand corner of the screen. This menu bar is also where you can mute/unmute your audio.

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- From your computer, click on the following link that is also included in the meeting calendar invitation: <https://pencleanenergy.zoom.us/j/87496649657>
- The Zoom Application will open on its own or you will be instructed to Open Zoom.

- After the application opens, the pop-up screen below will appear asking you to choose ONE of the audio conference options. Click on the Phone Call option at the top of the pop-up screen.

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- You will be instructed to enter the meeting passcode **2075 followed by #.**



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Shalini Swaroop, Chief Operating Officer

SUBJECT: Acceptance of Diversity, Equity, Accessibility, and Inclusion (DEAI) Annual Report for 2025 and Approval of a Resolution to Transition the Remaining and Ongoing DEAI Action Plan Items into PCE's Strategic Plan for 2026-2030

RECOMMENDATION

Accept the Diversity, Equity, Accessibility, and Inclusion (DEAI) Annual Report for 2025 and adopt a resolution recognizing the successful implementation of Peninsula Clean Energy's Diversity, Equity, Accessibility, and Inclusion (DEAI) Action Plan, with 94% of identified actions as complete and ongoing as of September 2025, and direct staff to transition the remaining ongoing and evolved items into annual departmental objectives and the Agency's 2026–2030 Strategic Plan.

BACKGROUND

The Board approved Peninsula Clean Energy's DEAI Policy in October 2022, affirming the Agency's responsibility to eliminate disparities and ensure that its programs, policies, and practices are inclusive and accessible for all customers. In May 2023, the Board adopted a companion DEAI Action Plan outlining 44 specific actions across six focus areas: organizational culture, staffing and recruitment, training and development, energy program design, marketing and account services, and vendor/supplier diversity.

The DEAI Action Plan was designed to launch and embed DEAI practices across the organization. The intention of the DEAI Action Plan was to be a living document that evolved over time as different initiatives were launched and completed. Over the past two years, staff have reported regularly to the Board on progress, including May 2024 and September 2025 updates.

DISCUSSION

As of September 2025, over 90% of the actions identified in the DEAI Action Plan are complete and some are ongoing. This includes major accomplishments such as:

- Adoption of DEAI policies and governance structures, including creation of a DEAI Council and appointment of a DEAI staff lead.

- Integration of DEAI metrics into staff performance reviews and recruitment practices, resulting in a workforce that is 70 percent from ethnically diverse or underrepresented groups.
- Completion of Agency-wide training on DEAI principles and accommodations with expanded professional development budgets.
- Development of community engagement tools and program accessibility standards.
- Improvements in customer accessibility through multilingual services, WCAG-compliant websites, and translated outreach materials.
- Embedding supplier diversity into procurement processes, including contract templates, evaluation criteria, and reporting requirements.

Of the remaining actions, several have evolved into broader initiatives that are now incorporated into the forthcoming 2026–2030 Strategic Plan; for example, the organizational energy equity definition, while a few will be carried forward as ongoing departmental objectives, such as expanding technology-enabled language access once our Salesforce system migration is complete.

With nearly all actions complete or ongoing, PCE has made significant progress, and staff recommends that the Board approve ongoing workstreams into annual planning and the 2026–2030 Strategic Planning process. This ensures that DEAI remains embedded in the Agency’s core operations and that future DEAI goals and reporting is centralized under the new Strategic Plan framework.

ATTACHMENTS:

[PCE_DEAI_Action_Plan_Implementation_Update_Sept_2025.docx](#)

RESOLUTION NO. _____

PENINSULA CLEAN ENERGY AUTHORITY, COUNTY OF SAN MATEO, STATE OF CALIFORNIA

ACCEPTANCE OF DIVERSITY, EQUITY, ACCESSIBILITY, AND INCLUSION (DEAI) ANNUAL REPORT FOR 2025 AND APPROVAL OF A RESOLUTION TO TRANSITION THE REMAINING AND ONGOING DEAI ACTION PLAN ITEMS INTO PCE'S STRATEGIC PLAN FOR 2026-2030

RESOLVED, by the Peninsula Clean Energy Authority, State of California, that

WHEREAS, the Board of Directors adopted Peninsula Clean Energy's Diversity, Equity, Accessibility, and Inclusion (DEAI) Policy in October 2022, affirming the agency's responsibility to eliminate disparities and ensure its programs, policies, and practices are inclusive and accessible to all customers; and

WHEREAS, in May 2023 the Board adopted the DEAI Action Plan, a framework of 44 specific actions designed to embed DEAI principles into Peninsula Clean Energy's workforce, operations, governance, and programs; and

WHEREAS, staff have provided regular updates on implementation of the DEAI Action Plan, including reports in May 2024 and September 2025; and

WHEREAS, as of September 2025, over 90% of the DEAI Action Plan actions have been completed, with the remainder either evolved into broader organizational frameworks or in progress to be carried forward as departmental objectives; and

WHEREAS, staff recommends transitioning remaining and ongoing DEAI-related activities into Peninsula Clean Energy's annual Objectives and Key Results (OKRs) process and into the forthcoming 2026–2030 Strategic Plan to ensure continued accountability and integration;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of Peninsula Clean Energy Authority hereby:

1. Directs staff to transition all remaining and ongoing DEAI actions into the agency's annual departmental planning processes and the 2026–2030 Strategic Plan; and
2. Reaffirms the agency's commitment to ensuring diversity, equity, accessibility, and inclusion remain central to Peninsula Clean Energy's mission, values, and operations.

An aerial photograph of a large solar farm, showing rows of solar panels stretching across a landscape. The panels are arranged in a grid pattern, with some rows appearing more prominent than others. The colors of the panels range from light blue to dark blue, with some rows showing a reddish-brown hue, possibly due to the angle of the sun or the type of panels used.

DIVERSITY EQUITY ACCESSIBILITY INCLUSION

DEAI Action Plan

Implementation Update Sept 2025

Peninsula Clean Energy

Background on Peninsula Clean Energy's Diversity, Equity, Accessibility, and Inclusion (DEAI) Action Plan

The Peninsula Clean Energy (PCE) [Strategic Plan 2020-2025](#) stated an all-encompassing goal to “Ensure organizational excellence by adhering to sustainable business practices and fostering a workplace culture of innovation, diversity, transparency, and integrity.” This is reflected in PCE’s [Inclusive and Sustainable Workforce Policy](#), originally adopted in December 2016, that further states “PCE recognizes that an inclusive and sustainable workforce helps PCE meet its core mission and goals more effectively, serve its customers in a more culturally sensitive manner, and reflect the businesses we partner with and the community we serve more comprehensively.” These actionable statements relate to embedding diversity, equity, accessibility, and inclusion (DEAI) within PCE’s organization.

PCE’s ongoing journey to integrate these DEAI principles within its organization became more significant starting in 2020 when efforts were initiated by the Community Advisory Committee (CAC) in light of the community’s focus on anti-racism initiatives. PCE has since then accelerated efforts to improve and enhance DEAI initiatives within the organization and outwardly to the communities it serves.

In May 2021, PCE released a Request for Proposal (RFP) seeking consultant assistance for Diversity, Equity, Accessibility, and Inclusion services. PCE selected GCAP Services, Inc. (GCAP), a certified Small Business (SB) and Disadvantaged Business Enterprise (DBE) firm, to provide expertise in developing a DEAI program with achievable goals and actions that PCE can implement and monitor over time.

Continual progress has been made on the DEAI Action Plan with the leadership of the DEAI Council and the internal subject matter experts within staff. As of September 2025, with over 90% of the required actions complete, staff recommends that the Board transition the remaining ongoing, evolved, and uncompleted actions into annual department and staff planning. Further DEAI initiatives will be enumerated as part of the objectives and key results in PCE’s 2026-2030 strategic plan in order to better integrate all of PCE’s goals and reporting into one comprehensive framework moving forward.

Exhibit 1: PCE DEAI Area of Focus & DEAI Goal Description

Area of Focus	DEAI Goal Description
Organizational Culture and DEAI Commitment	Advance and promote diversity, equity, accessibility, and inclusion within PCE’s workforce, business practices, policies, and programs.
Human Resources, Staffing, and Recruitment	Create a workforce that is more representative and inclusive of people of all backgrounds; provide equitable access to employment opportunities for underrepresented and underserved members of the communities PCE serves.
Training and Development	Require employees to complete DEAI related training and promote and encourage Board and Citizen Advisory Committee members to complete DEAI related training to increase awareness of DEAI within the organization.
Energy Program Development and Implementation	Define energy equity and set goals and metrics for achieving it through our programs. Increase input and feedback from diverse communities, especially low-income and disadvantaged groups, to improve equity in program development and implementation.
Marketing and Account Services	Improve awareness, communication, and accessibility of PCE customer service, energy supply, and energy programs, especially among low-income and disadvantaged populations, and limited English proficiency groups.
Vendor and Energy Supplier Diversity and Social Responsibility	Ensure that the vendors and suppliers that do business with PCE are environmentally conscious and have equitable business practices. Establish a level playing field by creating opportunities and eliminating barriers to equal participation for all vendors.

Commitment to DEAI

The collaborative development of a DEAI policy with internal and external stakeholders demonstrates PCE's commitment to diversity, equity, accessibility and inclusion. As part of the growing interest in environmental, social, and governance factors, DEAI has become a vital part of an organization's performance. As a Community Choice Aggregation (CCA) program that provides clean energy services to its local communities, PCE ensures DEAI is a priority during decision making.

Peninsula Clean Energy (PCE) has a vision of a sustainable world with clean energy for everyone. We recognize there are longstanding systemic barriers that impede the advancement of fair and inclusive policies and limit the full participation of historically underserved and disadvantaged communities. This includes our stakeholders that face the most adverse impacts from economic, health, and environmental burdens. PCE recognizes that we have an obligation to maximize our efforts to eliminate disparities and ensure that our programs, policies, and practices are inclusive and accessible for everyone in the geographic markets we serve.

This excerpt from the DEAI policy communicates PCE's values, philosophy, and culture surrounding the significance of upholding diversity, equity, accessibility, and inclusion. PCE must continue to communicate the importance of DEAI to team members and other stakeholders to support cultivating a culture of organizational excellence.

Gap Analysis

To ensure that key aspects of PCE's internal and external DEAI initiatives were considered for the Action Plan, a detailed gap analysis was conducted to review all ideas and assess the feasibility for the agency. A gap analysis is an assessment method that helps measure the performance of an organization in a specific area to determine whether objectives are being met, and if not, what steps should be taken to meet them. In the context of DEAI, the gap analysis was customized to PCE's commitment to achieve and enhance DEAI initiatives within the organization.

The gap analysis consisted of: information and data collected from the surveys, interviews, policy updates, organizational document reviews, and workshops to help identify areas for improvement as well as the finding/gap, recommendations, and final goal derived from the analysis. The PCE DEAI Action Plan identifies six major areas of focus, which are depicted in *Exhibit 2: PCE's DEAI Areas of Focus*.

Each of these areas are accompanied by a main goal that is outlined with the plan's elements—goal, actions, steps, timeline, lead, metrics, and recommendations—that will help achieve these objectives. The areas of improvement are reflected from the key observations of the DEAI organizational assessment that consists of the surveys, interviews, and all related DEAI activities.

Exhibit 2: PCE's DEAI Areas of Focus



**DEAI Action Plan
Implementation
Update
September 2025**

Organizational Culture and DEAI Commitment

Goal: Advance and promote diversity, equity, accessibility, and inclusion within PCE's workforce, business practices, policies, and programs.

Background:

Through the gap analysis, "Organizational Culture and DEAI Commitment" has been identified as an area of focus to be addressed in the DEAI Action Plan. The goal is stated as the following "Advance and promote diversity, equity, accessibility, and inclusion within PCE's workforce, business practices, policies, and programs." By focusing on this goal, PCE will be able to ensure its company culture is interwoven with its commitment to DEAI. PCE is working towards an organizational culture that ensures all employees feel empowered to bring their authentic selves and new ideas and perspectives to the table. Also, PCE strives to be a steward for its community members by providing sustainable, clean energy through accessible and equitable programs and services. An organizational culture is very important to an organization's overall excellence. It defines how the organization does business and how it is perceived by all internal and external stakeholders. This includes communicating to external stakeholders Peninsula Clean Energy's commitment to advocate for regional and state policies supporting environmental and energy justice. By integrating a commitment to DEAI within the organization's culture, PCE has created a foundation of principles to cultivate a successful culture that will have a lasting, positive impact on its workforce and communities it serves.

Actions	Steps	Status	Lead	Metrics	Recommendations
Adopt DEAI Policy	- Finalize and approve Peninsula Clean Energy DEAI Policy - Notify relevant stakeholders of the new DEAI Policy	Complete	DEAI Project Team	- Board of Directors approved the Policy on 10/27/22 - Policy has been distributed and communicated to relevant stakeholders	- Post DEAI Policy to public website and share with CBO partners. - Make DEAI Policy available in other languages such as Spanish and Chinese - Make DEAI Policy accessible in large print format

Actions	Steps	Status	Lead	Metrics	Recommendations
Adopt DEAI Action Plan	- Finalize and approve Peninsula Clean Energy DEAI Action Plan - Notify relevant stakeholders on the new DEAI Action Plan	Complete	DEAI Project Team	- Board of Directors has approved and adopted the Action Plan - Action Plan has been distributed and communicated to relevant stakeholders - Report at least annually on progress of implementation of the Action Plan to the Board of Directors and Citizens Advisory Committee	- Post DEAI Action Plan to public website - Make DEAI Action Plan available in other languages such as Spanish and Chinese - Make DEAI Action Plan accessible in large print format
Form DEAI Council	Create Council guidelines that include the following information: membership and terms, roles and responsibilities, and expectations	Complete	DEAI Project Team	The Council is a composition of diverse members from different ethnicities, gender, generation, department, and other dimensions of diversity	- Utilize DEAI Action Plan as first endeavor - Allocate proper funding in the annual budget to support Council initiatives - Involve members of the Council in discussions and decision-making affecting policy, process, systems, and resources to ensure a diversity of perspectives are heard
Appoint a DEAI Lead	- Develop the role and responsibilities of the DEAI Lead, including estimated time commitment (FTE) - Appoint DEAI Lead and ensure individual understands role and responsibilities - Empower the DEAI lead to advance DEAI measures in the Action Plan and to support the DEAI policy across the organization	Complete	COO and DEAI Project Team	DEAI Lead is appointed and has started DEAI initiatives and policies	Assign responsibilities to a staff member (preferably not Human Resources personnel) to lead DEAI initiatives and policies

Actions	Steps	Status	Lead	Metrics	Recommendations
Establish a DEAI Action Plan Dashboard within the Strategic Plan, and incorporate into the annual staff performance review process	- Deploy a visual, user-friendly dashboard to track DEAI Action Plan initiatives and include information on the following: alignment to Strategic Plan and DEAI Policy, lead department/staff, progress status, next steps, recommendations to improve, etc. - Integrate accountability for implementing actions outlined in the DEAI Action Plan into staff annual performance review process	Evolved Reporting will be included in PCE 2026-2030 Strategic Plan	DEAI Lead and Council	- Strategic Plan Dashboard has been deployed and is tracked on an on-going basis - All DEAI Action Plan initiatives have been assigned to a lead department/staff to follow through - Staff annual review process has been updated to include a requirement for specific reporting on each DEAI action assigned to specific staff	- Deploy a dashboard that is easily manageable by the agency (see Appendix C for an example) - Consider incorporating into existing Strategic Plan Dashboard - Dashboard should be reviewed regularly with executive leadership team for awareness, feedback.
Create a DEAI Glossary	Create a glossary to define DEAI terms	Complete	DEAI Project Team	- Glossary updated and new terms added - Update on new DEAI webpage	- Post glossary on the website - See Appendix B for current DEAI definitions that are taken from the DEAI Policy - Additional definitions may include, but are not limited to the following terms: - Equity vs. Equality - Anti-Racism - Power Dynamics - Energy Equity - Implicit Bias

Actions	Steps	Status	Lead	Metrics	Recommendations
Annually review and ensure that Peninsula Clean Energy's Legislative and Regulatory Policy Platform section on environmental justice and affordability is meaningfully implemented	- Proactively engage with environmental justice organizations to understand common ground and determine legislative and regulatory mutual benefit - Review legislative and regulatory policy platforms of other CCAs - Review clean energy legislation as directed by Peninsula Clean Energy's Legislative and Regulatory Policy Platform section on environmental justice and affordability. - Annually update Peninsula Clean Energy's Legislative and Regulatory policy platform	Complete and Ongoing	Government Affairs, Regulatory Team	- Legislative and regulatory policy platform with energy and environmental justice items approved - Legislative priorities of environmental and energy justice advocates have been identified and Peninsula Clean Energy has actively determined our level of support for them	Participate in CalCCA Legislative Committee
Participate in or monitor CPUC, CARB, and CEC proceedings regarding energy affordability and environmental justice, in dialog with environmental justice networks	- Consult with environmental justice networks on their energy regulatory priorities to the extent practicable - Advocate for Peninsula Clean Energy positions that support these priorities and also align with other Peninsula Clean Energy's other regulatory policy priorities.	Complete and Ongoing	Regulatory Policy	- Create and update list of regulatory policy priorities identified by environmental justice networks annually - Identify how Peninsula Clean Energy regulatory policy may promote these priorities, where aligned with Peninsula Clean Energy other policy priorities	- Work with relevant CalCCA working groups - Develop direct relationships with environmental justice networks

Actions	Steps	Status	Lead	Metrics	Recommendations
Establish DEAI Framework for Goal Setting and Decision Making	Develop a list of DEAI questions to consider and ask before producing organizational goals, policies, programs, practices, and decisions	Complete	DEAI Council	All employees are aware of these DEAI questions and have implemented into daily practices	- Consider including the following questions: - Who is this work positively or negatively impacting? - Have you considered gender, race, religion, physical ability, location, socioeconomics, etc.? - Who could be excluded by this work? - Does this work impact groups differently? - What does the data say? - Has this work been communicated transparently? - Could this work hinder feeling of belonging, especially in underrepresented groups? - How will you ensure criteria is fair and transparent?

Area of Focus

Human Resources, Staffing, and Recruitment

Goal: Create a workforce that is more representative and inclusive of people of all backgrounds; provide equitable access to employment opportunities for underrepresented and underserved members of the communities PCE serves.

Background:

The gap analysis identified “Human Resources, Staffing, and Recruitment” as a DEAI area of focus with a sizeable number of external and internal stakeholders believing that PCE staff does not fully reflect the diversity of the communities it serves. The goal for this area is to “Create a workforce that is more representative and inclusive to people of all backgrounds; provide more equitable access to employment opportunities for underrepresented and underserved members of the communities PCE serves.” By striving to achieve this goal, PCE will achieve greater workforce diversity to better represent customers and allow the organization to better understand and serve their needs. A diverse workforce will allow PCE to understand various markets and reach customers they otherwise may not have. Additionally, a diverse and inclusive environment tends to bring employees a sense of belonging, improves employee morale, and overall helps with retention.

Actions	Steps	Status	Lead	Metrics	Recommendations
Finalize and Adopt DEAI Revisions to the Strategic Plan, Employee Handbook, Policy 9, and Policy 10	▪ Peninsula Clean Energy reviews and revises GCAP's suggested edits ▪ Obtain Board of Directors approval ▪ Inform Peninsula Clean Energy staff, especially hiring managers, on the changes	Complete	DEAI Council	▪ Board approval obtained ▪ Revised documents published and available to Peninsula Clean Energy employees and external stakeholders	▪ When creating, updating, revising policies and procedures, ensure they are in alignment with the DEAI Policy

Actions	Steps	Status	Lead	Metrics	Recommendations
Increase the diversity of our staff team	- Research and diversify places we advertise our job opportunities - Analyze workforce needs, qualifications and work with hiring managers to determine bona-fide qualifications - Gather current data to understand the ethnic, gender, disability, veteran composition of our communities so that Peninsula Clean Energy can strive to be reflective within its workforce - Identify and remove artificial barriers to entry - Collaborate with leadership to find better ways to increase diversity	Complete and Ongoing As of 2025, 70% of PCE's workforce identifies as an under-represented minority.	Leadership and Human Resources	- Number of open and filled positions with diverse employees - Outreach to diverse communities during recruitment - Monitor changes in diversity of the candidate pool throughout the interview and hiring process - Leadership, especially hiring managers, increased diversity in the workforce	- Prioritize open management positions, especially senior manager roles - Use S.M.A.R.T. (specific, measurable, attainable, relevant, and time-bound) goals to establish your strategic diversity goals
Actively Outreach to a Diversity of Communities/Groups in Recruitment Process	- Review current outreach process and identify gaps - Add non-traditional outreach sources (e.g., websites supporting professional and technical groups) focused on underrepresented and historically marginalized people - Develop a plan for recruitment engagement that focuses on building trusted, long-term relationships with under-served and historically marginalized people - Collaborate with relevant groups to enhance diversity of applicants	Complete & Ongoing	Human Resources	- Measure current level of effort and results for diversity recruiting - Compare level of effort after collaborating through additional avenues - Number of partnerships with various organizations that support underrepresented groups	- Reach out to professional networks, online and social media, diversity websites, job boards to expand outbound reach - Support professional and technical groups focused on diverse persons, people with disabilities, Veterans, and the LGBTQAI+ community

Actions	Steps	Status	Lead	Metrics	Recommendations
Ensure Salary Transparency	- Post salary ranges on all job announcements and advertisements - Consider a salary administration policy - Communicate salary administration policy	Complete	Human Resources	- Conduct a market salary survey and identify salary ranges for different job and department classifications - Salary administration guidelines developed	Be transparent with staff by communicating salary changes and how they can achieve the next level in their position
Enhance DEAI in the Application and Interview Process	- Train hiring managers on how to mitigate bias during the hiring/promotions processes, and how to best utilize DEAI human resource tools and methods - Track diversity metrics for recruiting, hiring, promotion, and internal transfers - Add preference for candidates who are fluent in Peninsula Clean Energy priority languages to job announcements in customer-facing teams	Complete & Ongoing	Human Resources	- Track job candidate pools by demographic categories including age, gender, race, disability, veteran status, and job level - Percentage and number of managers and interviewers who have completed training on how to mitigate bias during the hiring process	- Review all job postings for gender neutral language and other DEAI considerations to attract diverse candidates - Consider redacting name/identifying information from resumes during screening process - Use the training plan to guide Peninsula Clean Energy in developing training course in house or using an outside trainer; See Appendix D for proposed Training Plan

Actions	Steps	Status	Lead	Metrics	Recommendations
Integrate DEAI Metrics in Employee Performance Reviews	Review current performance review process for employees and require reporting on each specific DEAI action assigned to each staff member	Complete & Ongoing	Human Resources	- Revised employee performance review form - Clear integration of DEAI Action Plan task assignments with annual performance review	- Add a question to the employee annual review form asking the employee to report on the status of implementation of DEAI Action Plan items assigned to their team, and how the employees has utilized the DEAI Decision Guidelines in their work NOTE: make a broader question - Leverage employee performance reviews to ask what they believe could be improved upon or what is working well in regard to DEAI initiatives
Launch a Self-ID Campaign	- Develop a voluntary demographics data survey - Ask current employees to complete the voluntary survey - Utilize survey as a tool on employment applications	Complete & Ongoing	Human Resources	- Optional Self-ID survey tool developed - Optional Self-ID survey completed by existing Peninsula Clean Energy employees - Optional Self-ID added to employment application	- Make the survey optional and voluntary, however, ensure to encourage participation, sharing specific benefits to employees to Self-ID - Go beyond regular demographics data and include Disability, Veteran, language ability and LGBTQAI+ statuses - Communicate clearly to all staff who will have access to the information collected in the self-ID campaign and how it will be used

Area of Focus

Training and Development

- **Goal:** Require employees to complete DEAI related training and promote and encourage Board and Citizen Advisory Committee members to complete DEAI related training to increase awareness of DEAI within the organization.

Background:

While PCE staff and management are supportive of DEAI, the gap analysis identified the need for “Training and Development” to strengthen DEAI understanding for all staff. As well, PCE executives and managers need to consistently model inclusive leadership skills. Formalizing DEAI training will establish deeper awareness and help transform mindsets to create an inclusive culture where all employees are welcomed and encouraged to thrive, ultimately benefitting customers and business results for PCE.

Actions	Steps	Status	Lead	Metrics	Recommendations
Finalize and Approve DEAI Training Plan (See Appendix D)	▪ Review, revise, and finalize the Peninsula Clean Energy DEAI Training Plan	Complete & Evolved to Provide Trainings Beyond Originally Envisioned	Leadership and Human Resources	▪ Training Plan is finalized and implementation has been started	▪ Use surveys to track feedback from each training class topic and leverage the data and information to improve future trainings and facilitation methods
Select Training Method & Develop Training Courses	▪ Review and evaluate best training methods ▪ Determine budget and required resources ▪ Develop curriculum for training	Complete	Human Resources	▪ Training budget and materials have been developed ▪ First round of classes conducted within 12 months ▪ Number of attendees by class	▪ Prioritize roll-out of training courses for highest value and broadest impact to Peninsula Clean Energy ▪ Offer training to Board of Directors and Citizens Advisory Committee members as well as staff

Actions	Steps	Status	Lead	Metrics	Recommendations
Provide Training on How to Respond to an Accommodations Request	Develop practices and guidelines to respond to external and internal accommodation requests such as telephone calls in different languages, reasonable accommodations for public meetings, etc.	Complete	Human Resources	- All managers have completed the training - All managers understand how to respond to accommodation requests appropriately and promptly - Number of accommodation requests received from employees and the public	Ask leaders for input on what requests they have received in the past and include those areas to address
Provide Training on Community Engagement for Program Planning	- Develop practices and guidelines to help staff engage community leaders and organizations by: - Identifying and researching the target audience - Researching local community leaders or organizations that serve the audience - Including local community leaders in program design - Formalizing community partnerships in program implementation	Complete	Community Relations	- All Programs and Marketing Teams have completed the training - All Programs and Marketing Team Leads understand how to engage community leaders and organizations in program design and implementation	Utilize the Community Engagement for Program Development Worksheet Template in the training (See Program Development and Implementation section)

Actions	Steps	Status	Lead	Metrics	Recommendations
Ensure Professional Development Opportunities are Available and Accessible	- Survey staff to understand what types of professional development they are interested in and what barriers, if any, deter them from participating in professional development opportunities - Gain leadership buy-in to integrate new professional development opportunities - Establish or update the Professional Development Program and share with employees	Complete & Ongoing	Human Resources	- Percentage of staff who pursue professional development opportunities by demographically tracked data - Professional development included in annual employee performance reviews	- Create a resource page about professional development opportunities to share with staff - Implement a "Diversity Dialogue" series with outside speakers

Area of Focus

Energy Program Development and Implementation

Goal: Define energy equity and set goals and metrics for achieving it through our programs. Increase input and feedback from diverse communities, especially low-income and disadvantaged groups, to improve equity in program development and implementation.

Background:

Energy programs are a priority area for the agency and every effort will be made to address diversity, equity, accessibility, and inclusion for program development and implementation. The gap analysis identified a need to increase input and feedback from diverse communities throughout program design and delivery to improve equity overall. By conducting meaningful public participation throughout the program development phases, stakeholders are given the opportunity to influence decisions that affect their daily lives and PCE will make better and more easily implementable decisions that reflect public interests and values and are better understood by the public. Note that reducing greenhouse gas emissions in the most effective ways possible can also be considered important for equity as vulnerable communities are most impacted by climate change.

Actions	Steps	Status	Lead	Metrics	Recommendations
Create Organizational Definition of and Goals for Energy Equity and Incorporate into Programs	- Research energy equity frameworks and definitions - Create energy equity definition, goals, and metrics for Peninsula Clean Energy - Solicit input from community stakeholders, CAC, and Board and finalize based on feedback - Implement, including evaluating current and future programs for how well they meet these goals and what changes need to be made	Evolved to Reflect Equity and Vulnerable Customers Definition in PCE Strategic Plan 2026-2030	DEAI Council, Director of Programs, Programs Team, Director of Account Services	- Energy equity definition, goals, and metrics drafted - Community input incorporated from partners, CAC, and Board - Definition, goals, and metrics finalized - Changes made to programs and budgets as needed to meet goals	- Engage all members of the Programs Team in this effort - Include Account Services to evaluate the role of rate structures as well

Actions	Steps	Status	Lead	Metrics	Recommendations
Develop and Finalize a Worksheet Template for “Community Engagement in Program Development”	▪ Leverage the DEAI Lens to help develop the worksheet template to: ○ Identify and research target audience(s) ○ Research local community leaders or organizations that serve diverse communities ○ Include local community leaders in program design ○ Formalize community partnerships in program implementation as needed	Complete	Community Relations	▪ Worksheet template is completed and approved by the appropriate staff	▪ Refer to Appendix G: “Implementing Equity” ▪ Make worksheet template a required element for all internal business plans for Peninsula Clean Energy Programs
Engage with Community Leaders and Community Based Organizations in the Early Stages of Public Facing Program Development	▪ Utilize the Community Engagement Worksheet when engaging with community leaders and organizations ▪ Integrate community feedback into regular program development process	Complete & Ongoing	Programs and Community Relations	▪ Completed Community Engagement Worksheet prior to program development and implementation ▪ Community feedback is incorporated into program design, as appropriate ▪ Include section on community feedback and how it was incorporated into program design when bringing programs to leadership and the Board for approval as appropriate	▪ Outreach to diverse community groups and leaders ▪ Include as a required action during program development ▪ Train program managers to understand and complete each step in the process in a meaningful way (See Training and Development section)

Actions	Steps	Status	Lead	Metrics	Recommendations
Review Current Programs for Gaps & Inequities and Continuously Refine Programs to Better Align with Customer Needs	▪ Re-examine the following program elements: ○ Target audience (conduct additional research if needed) ○ Program qualifications and eligibility requirements ○ Community outreach partners (leaders and organizations) and methods ○ Effort required to participate in programs (e.g. time burden) ▪ Identify gaps and inequities in current programs ▪ Evaluate community feedback opportunities throughout program lifecycle and opportunities to integrate feedback ▪ Evaluate distribution of benefits from each program ▪ Develop plan to address gaps and inequities	Complete	Programs and DEAI Council	▪ All current Peninsula Clean Energy programs have been reviewed for proper community engagement ▪ All program inequities are identified and have a plan to be addressed or a clear justification for why it is not being addressed ▪ Review of each program at least once per year for ways to improve equitable access and alignment with customer needs	▪ Utilize Community Engagement Worksheet to re-examine current programs ▪ Ask for customer feedback on existing programs and customer journey ▪ Learn from and share best practices on equity in programs with other CCAs

Actions	Steps	Status	Lead	Metrics	Recommendations
Implement Peninsula Clean Energy language and technology access guidelines for entire customer journey for Peninsula Clean Energy programs	- Map customer journey for all programs - Identify language and technology isolation in target audiences for all Peninsula Clean Energy programs - Implement language and technology access policy for enrollment forms, confirmation emails, customer support, terms and conditions and other forms of communication - Establish alternative methods for interacting with Peninsula Clean Energy other than online	Not Fully Completed due to delay in Salesforce Migration	Programs and Community Relations	- Documents that have been tagged for translation are available in target languages - Customer support available in recommended languages according to language access policy for programs according to target audience	- Consider dedicating staff time to provide program customer service in target languages - Recruit contractors with language fluencies

Marketing and Account Services

Goal: Improve awareness, communication, and accessibility of PCE customer service, energy supply, and energy programs, especially among low-income and disadvantaged populations, and limited English proficiency groups.

Background:

The gap analysis identified a need to enhance DEAI within PCE's "Marketing and Account Services" area. PCE should work on developing and implementing targeted communication efforts that are meaningful to the diverse communities it serves in order to improve awareness of PCE's customer service, energy supply and energy programs, especially with low income and limited English proficiency groups. PCE should identify and utilize appropriate means of communication and provide materials in different languages to reach its diverse customer base. In soliciting community input, PCE must be open to feedback and constructive criticism. PCE's outreach and communication strategy should aim to be dynamic, adjusting with changes in the target audience and the needs and interests of the communities served by PCE.

Actions	Steps	Status	Lead	Metrics	Recommendations
Ensure that customer awareness surveys include and are reflective of Peninsula Clean Energy's diverse customer base	- Ensure market survey vendors are making appropriate efforts to reach survey respondents who fully reflect the economic and ethnic diversity of our customer base - Conduct focus groups in Peninsula Clean Energy priority languages with target audiences to understand what areas Peninsula Clean Energy should focus on and prioritize to best understand the needs and issues target audiences are facing	Complete & Ongoing	Marketing and Community Relations	- Peninsula Clean Energy market survey participants fully reflect the economic and ethnic diversity of our customer base for the target audience being surveyed - Peninsula Clean Energy focus groups are held in Peninsula Clean Energy priority languages in diverse geographies of our service area	- Offer survey in different languages - Survey is accessible and available in multiple formats (online form, paper/pencil, verbal, etc.)

Actions	Steps	Status	Lead	Metrics	Recommendations
Ensure Peninsula Clean Energy Public Website is Accessible	- Review the Web Content Accessibility Guidelines (WCAG) and audit Peninsula Clean Energy's current website for compliance with standards (Q1 2023) - Identify areas of non-compliance of the current website, set priorities, and develop a timetable and plan to remedy (Q2 2023) - Ensure that customer-facing applications and forms are available per Peninsula Clean Energy's language and technology access policy (Q4 2023) - Review and update Peninsula Clean Energy brand guidelines for accessibility (Q2 2023)	Complete	Marketing and Community Relations	- Peninsula Clean Energy's public website, including attachments, meets the WCAG requirements - Ensure Peninsula Clean Energy website is available in Peninsula Clean Energy priority languages	- Include proper alt text for images - Ensure links have unique and descriptive names - Design forms with accessibility in mind - Investigate adding auto translate for pdfs on website
Develop a DEAI Webpage	Create a webpage dedicated to DEAI information. Include DEAI Policy, DEAI Action Plan, DEAI activities, etc.	Complete	Marketing and Community Relations	Webpage is developed and available to the public	Post DEAI statement on Peninsula Clean Energy home page as well as next to Peninsula Clean Energy mission, vision, values

Actions	Steps	Status	Lead	Metrics	Recommendations
Increase Accessibility in Public Meetings	▪ Develop a “Meeting Accessibility” statement ▪ Include the statement in the agenda template for Board of Directors, committee meetings, and all other public meetings ▪ Utilize accessibility methods for different types of meetings (virtual, in-person, etc.) ▪ Ensure access for physically disabled members of the public in accordance with ADA requirements	Complete	Board Clerk, Marketing and Community Relations	▪ Number of recommendations and steps implemented ▪ Number of accommodations request received and responded to.	Meet with accessibility community groups to explore accessibility in these areas: ▪ Venue (such as facilities, telephone, virtual meeting software, etc.) ▪ Technology (such as captioning, ASL interpreting, braille, large print, etc.) ▪ Materials (such as meeting links, captioning links, graphics, etc.) ▪ Presentations (such as documents, audio/visual media, no flashing, high contrast, font size, etc.) ▪ Other (such as screen sharing, polls/surveys, etc.)

Actions	Steps	Status	Lead	Metrics	Recommendations
Increase Accessibility and Diversity in Outreach Materials and Customer Notifications	- Ensure documents are accessible (simple to understand, adheres to language and technology access policy, large print, using terminology that is gender neutral and respectful, etc.) - Utilize imagery that mirrors the diversity of the communities we serve	Complete & Ongoing	Marketing and Community Relations, Account Services	- Implementation of steps and recommendations - Outreach materials and customer notifications are available in languages required by Peninsula Clean Energy language and technology access policy	- Identify priority documents to be translated first; what documents are the most requested? - Identify PDFs on website that can be posted directly on webpage in html that auto translates into various languages - Outreach to regulatory bodies to consider making PCL/JRM templates in other languages
Develop Peninsula Clean Energy Language and Technology Access Guidelines	- Survey other agencies' language and technology access policies for best practices - Identify metrics used to quantify language and technology isolation across our service territory, if available - Draft/amend guidelines that incorporates best practices and addresses language and technology access needs of our customers	Complete	Marketing and Community Relations	Language and Technology access guidelines are finalized, implementation started	Circulate language and technology access policy to appropriate CBO partners/stakeholders to gather feedback prior to finalization

Actions	Steps	Status	Lead	Metrics	Recommendations
Ensure CSRs provide quality customer service in all Peninsula Clean Energy priority languages	- Review Calpine contract to see what is included for translation vs. Bilingual CSR coverage - Strengthen contract requirements when possible for bilingual CSRs in priority Peninsula Clean Energy languages (2025)	Complete	Account Services	- Request data from call center vendor on how many callers requested service in a different language and whether they were served by a bilingual CSR in that language vs translator - Customer experience and feedback	- Consider internal bilingual CSR to handle escalated calls and program support - Consider asking call center vendor for post-call optional customer satisfaction survey
Ensure customer email inquiries in Peninsula Clean Energy priority languages receive accurate responses in same time frame as inquiries in English	- Develop a procedure for handling written inquiries in languages other than English - When developing the procedure, determine whether to utilize Peninsula Clean Energy staff who have fluency in languages other than English when crafting responses - Make an internal document for frequently asked billing questions, translated into Peninsula Clean Energy priority languages	Complete	Account Services	Time frame for non-English responses compared to English responses	- Survey other CCAs through CalCCA working groups to determine best practices for responding to customer inquiries in languages other than English - Brief staff and their supervisors with fluency in other languages on process/turnaround time expectations to answer customer inquiries

Area of Focus

Vendor and Energy Supplier Diversity and Social Responsibility

- **Goal:** Ensure that the vendors and suppliers that do business with PCE are environmentally conscious and have equitable business practices. Establish a level playing field by creating opportunities and eliminating barriers to equal participation for all vendors.

Background:

The need for greater supplier diversity was identified in the gap analysis. To accomplish this, PCE must promote diversity and the involvement of women- and minority-owned, and other diverse businesses in its supply chain. In addition to helping small, minority-, and women-owned companies participate in PCE's procurement process, a diverse supply chain benefits PCE by providing multiple sources from which to buy goods & services, which promotes healthy competition between PCE's existing and potential diverse vendors by improving pricing and service levels.

During the development of the PCE DEAI Policy, it was suggested in many of the workshops that the vendors and suppliers that do business with PCE should also have similar values in DEAI for their companies. The goal that was developed is to "Ensure that vendors and suppliers that do business with PCE are environmental conscious and have equitable business practices." Assessing suppliers and vendors on DEAI principles demonstrates that PCE takes these topics seriously and strengthens the commitment to DEAI. When vetting the commitment level of suppliers and vendors, business decision-makers at PCE should focus on what kind of diversity, equity, and inclusion reports and sustainability reports a firm has, which is typically available on their websites. This extra step in ensuring a supplier or vendor is ethical and committed to DEAI will lead into more creative, innovative, and effective solutions and products, which is something important to PCE's mission of providing clean energy at lower rates to residents of the communities it serves.

Actions	Steps	Status	Lead	Metrics	Recommendations
Finalize and Adopt the Recommendations in the Legislation & Regulatory Analysis Report (See Appendix E)	▪ Review GCAP recommendations in the Legislation & Regulatory Analysis Report	Complete	Power Resources	▪ Approved recommendations completed	▪ Review and monitor legislative and regulatory requirements on an ongoing basis

Actions	Steps	Status	Lead	Metrics	Recommendations
Finalize and Adopt Recommended Revisions of Peninsula Clean Energy's Contracting Documents and Templates	- Review contracting documents and templates (Contracting Template, RFO, RFP, and Supplier Diversity Questionnaire) to identify potential bias and inequities in the language - Review and finalize GCAP suggested edits and updates to the contracting documents and templates - Integrate DEAI principles and commitment into documents and templates	Complete	Power Resources	- Revised documents published and available to Peninsula Clean Energy employees engaged in procurement activities - All contracting documents and templates have DEAI commitment	- Review and update these documents on a regular basis to keep current with legislative and regulatory requirements - Notify Primes of commitment to DEAI
Add Qualitative Questions to RFO Template for Utility Scale Procurements Regarding Environmental Stewardship, Disadvantaged Community Outreach, Workforce Development, Responsible Procurement, and Supplier Diversity	- Conduct research on best practices w/r/t qualitative questions to ask during procurement process - Seek input from Community Relations and Supplier Diversity Lead on questions to add to RFO template - Survey relevant Peninsula Clean Energy policies (Policy #9, #10, DEAI Policy) to brainstorm questions to add to template - Integrate questions into Qualitative Assessment tab of RFO template	Complete	Power Resources, Community Relations	Questions integrated into Qualitative Assessment tab of RFO Template for renewable energy	- Survey other CCAs and industry organizations for common questions asked during procurement processes to add to qualitative review - Conduct review of template

Actions	Steps	Status	Lead	Metrics	Recommendations
Adopt Supply Chain Code of Conduct	- Conduct research human rights and industry organizations best practices for ethical supply chain principles - Draft Supply Chain Code as an attachment to Policy #10: Inclusive and Sustainable Workforce - Integrate Supply Chain Code into Power Purchase Agreements (PPA)	Complete	Power Resources	- Supply Chain Code adopted by Board - Supply Chain Code integrated into PPA	Conduct periodic review to update Supply Chain Code to remain current with industry best practices
Develop and Implement Diverse Subcontractor Reporting	- Develop a small, local, and diverse supplier form for proposers/bidders to complete when submitting proposers/bids or as part of the contract award process (see monthly paid subcontractor report template) - Develop annual data request for subcontractor spending to send to all primary vendors - Develop a reporting mechanism to monitor commitments and payments to subcontractors certified by the CPUC Supplier Clearinghouse and other diverse businesses	Not Complete	Power Resources	Number and percentage of diverse vendors and their subcontractors that were awarded work with Peninsula Clean Energy	- Establish a diverse supplier subcontractor report for Peninsula Clean Energy contracts (See Appendix F) - Peninsula Clean Energy can consider annual reporting requirements in its solicitations and resulting contracts - Peninsula Clean Energy can request all first-level subcontractors be listed on a form for all proposal/bids - Peninsula Clean Energy can require that diverse contractor/subcontractor data be provided

Actions	Steps	Status	Lead	Metrics	Recommendations
Develop Outreach Materials on how to do Business with Peninsula Clean Energy and a GO 156 FAQ document	- Create separate Supplier Diversity page on website - Develop website content with information on how to do business with Peninsula Clean Energy; Include step-by-step information on how a vendor/supplier (especially diverse suppliers) are able to work with Peninsula Clean Energy - Develop collateral for a GO 156 FAQ	Complete & Ongoing	Power Resources, Marketing and Community Relations	- Supplier Diversity webpage created with relevant resources - How to do Business content is posted on the website - Increase of small, women-owned, minority-owned businesses interested in doing business with Peninsula Clean Energy	
Increase Visibility of Solicitations Webpage	Move the "Solicitations" webpage link to a more visible area of the Peninsula Clean Energy website	Complete	Marketing and Community Relations	Number of clicks to solicitation page currently and after placing in a more featured area	Create a link, such as "Business Opportunities" that is accessible on the main menu

Actions	Steps	Status	Lead	Metrics	Recommendations
Conduct Supplier Diversity Training for All Staff	- Identify best practices to improve supplier diversity/outreach to diverse suppliers during RFP/RFO process, including pulling vendor lists from the CPUC's Supplier Clearinghouse and posting solicitations to the Supplier Clearinghouse bid board - Create training content based off best practices - Include in training how best to utilize edited contracts and solicitation documents - Include in training content how to conduct outreach to "qualified but not yet certified" suppliers to encourage them to go through certification process - Conduct training at a lunch and learn	Complete & Ongoing	Power Resources	- Staff training completed - Tactics to increase supplier diversity utilized whenever there is a procurement \$ and % of diverse spend tracked in annual supplier diversity reports	- Collaborate and seek input from staff regarding how to incorporate diverse supplier outreach into their specific solicitation processes - Survey other CCAs for training material used for similar trainings
Encourage Vendors/Suppliers to Practice Equity	Add required question regarding DEAI and supplier diversity practices to RFP/RFO template	Complete	Power Resources	RFO and RFP templates updated	Share Policy 9: Ethical Procurement Conduct and DEAI Policy with vendors and suppliers
Measure customer satisfaction with customer service provided by vendors	Include questions about customer service offered by vendors in any relevant customer facing surveys	Complete	Programs, Account Services, Marketing	Identify and address any customer service issues with vendors	Hold vendors accountable via the contracting process for how they treat public members utilizing Peninsula Clean Energy programs and services



**PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence**

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Justin Kudo, Associate Director, Rates and Strategic Analysis
SUBJECT: Approval of Proposed Reduction to the ECO100 Rate

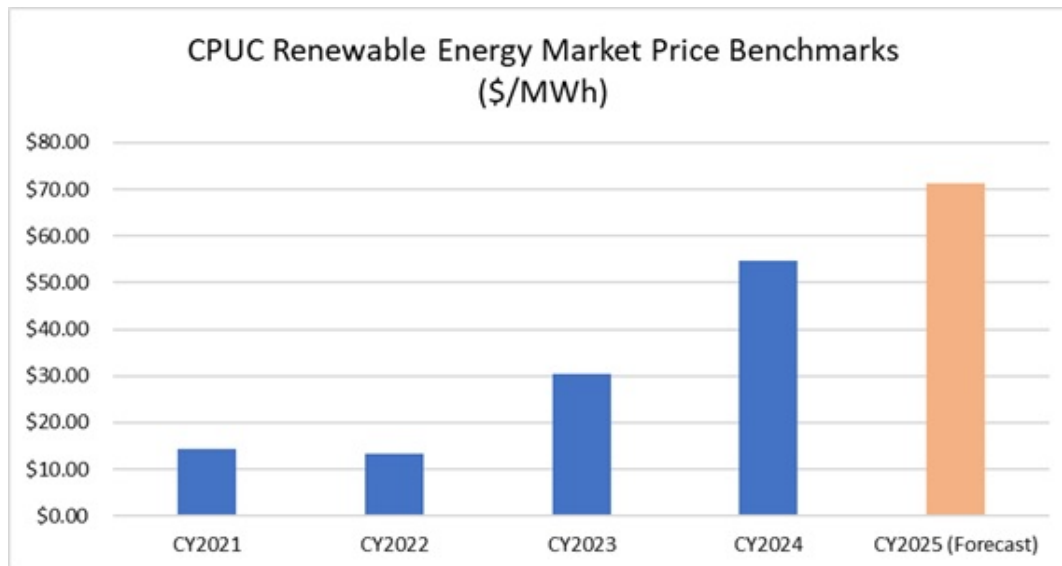
RECOMMENDATION

Approval of the proposed change to ECO100 rates, reducing the premium from 1.5 cents per kilowatt-hour (kWh) to 1 cent per kWh.

BACKGROUND

On June 27, 2024, the Board voted to increase the additional rate associated with ECO100 service from 1 cent per kWh to 1.5 cents per kWh, effective January 1, 2025. ECO100 matches customer energy usage with 100% renewable resources, rather than PCE's baseline portfolio of 60% renewable and 40% carbon-free energy. This change was made based on a review of ECO100's operating costs, which includes staff hours, Green-e certification, and replacing carbon-free resources with renewable resources.

Key to this evaluation and recommendation was a significant increase in renewable energy premiums during 2024 and 2025. While exact contract prices and terms are not public information, the California Public Utilities Commission (CPUC) provides an aggregated Market Price Benchmark for renewable energy premiums, which was last updated in October 2024 and demonstrated the anticipated cost increase of renewable energy (see graph below).



The increased price of renewable resources significantly raised the forecast operational costs of ECO100, and a rate of 1.5 cents per kWh was recommended in June 2024 to ensure cost recovery from participating ECO100 customers. Several other CCAs made similar increases to their 100% renewable energy products last year as well.

DISCUSSION

Staff have continued to monitor the program costs and revenues associated with ECO100 to ensure proper cost recovery of the program from participating customers. Over the course of 2025, renewable premiums have dropped towards previous pre-2024 levels and are not expected to increase significantly through 2029. The forthcoming October 2025 CPUC Renewable Market Price Benchmark will likely show a large decrease in actual prices for 2025 and the 2026 forecast.

In consideration of the current trajectory of energy prices, Staff proposes returning to the original \$0.01 per kWh rate. Staff will continue to monitor costs and revenues associated with ECO100 to ensure adequate cost recovery of the program. Staff believes this updated rate should be sufficient until at least 2027, and likely longer.

As part of Green-e certification, PCE is obligated to provide advance notice to program participants of any changes to ECO100 rates. Staff's proposal would change rates effective January 1, 2026, which provides enough time for this notification process, and would simplify messaging of annual program specifications. Customers enrolled in ECO100 would receive emailed and/or mailed notices summarizing the downward pricing change.

On September 8th, 2025, PCE's Executive Committee unanimously recommended that PCE's Board of Directors adopt the proposed changes to PCE's ECO100 rates.

FISCAL IMPACT

Decreasing ECO100 premiums by \$0.005 per kWh would decrease revenue by approximately \$1 million annually based on current ECO100 participation, and will result in a \$500,000 variance to the FY 2026 budget assuming a January 1, 2026 effective date.

RESOLUTION NO. _____

PENINSULA CLEAN ENERGY AUTHORITY, COUNTY OF SAN MATEO, STATE OF
CALIFORNIA

APPROVAL OF PROPOSED REDUCTION TO THE ECO100 RATE

RESOLVED, by the Peninsula Clean Energy Authority of the County of San Mateo, State of California, that

WHEREAS, Peninsula Clean Energy (PCE) was formed on February 29, 2016; and

WHEREAS, promoting renewable energy usage and reducing greenhouse gas emissions are organizational priorities for PCE; and

WHEREAS, revisions to PCE's ECO100 rates will better align premiums with incremental service costs; and

NOW, THEREFORE, IT IS HEREBY DETERMINED AND ORDERED that the Board approves reducing PCE's ECO100 rate adder to \$0.01/kWh, effective January 1st, 2026.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Justin Kudo, Associate Director of Rates and Strategic Analysis

SUBJECT: Approval of Amendments to the Zero-Carbon Intensity Low Carbon Fuel Standard Tariff

RECOMMENDATION

Approval of the revised Zero-Carbon Intensity Low Carbon Fuel Standard Tariff (Tariff), as set forth in Exhibit A.

BACKGROUND

The Zero-Carbon Intensity Low Carbon Fuel Standard (ZCILCFS) Tariff provides local transit agencies with dedicated resources from 100% renewable energy, necessary to meet eligibility requirements for the Low Carbon Fuel Standards (LCFS) program operated by the California Air Resources Board (CARB). The program uses a cap-and-trade type system, where fuels with lower carbon emissions can earn additional revenues.

The ZCILCFS Tariff was adopted by PCE's Board on April 25, 2024, to provide eligible public transit agencies, such as Caltrain, with a zero-carbon intensity fuel pathway. Enrolled customers receive 100% renewable energy at ECOplus rates, as opposed to the higher-priced ECO100 rates.

This Tariff advances PCE's goal of reducing greenhouse gas emissions in San Mateo County by supporting the electrification of public transit on the Peninsula. In October 2024, Caltrain became the first public transit agency to enroll in this Tariff.

DISCUSSION

In September 2024, Caltrain transitioned its passenger rail system from a diesel fleet to an all-electric fleet. It was the first such transition in the Western United States. The new electric trains receive power through an overhead contact system that connects to the electric grid at the San Jose Diridon station and the South San Francisco station. PCE serves the traction power station in South San Francisco and San Jose Clean Energy serves the traction power station in San Jose.

Caltrain's new electric fleet generates electricity through regenerative braking. Like electric

vehicles, regenerative braking takes the kinetic energy which would typically be lost to friction and heat during braking and uses it to generate electricity. However, the mass of passenger trains generates significantly more kinetic energy than can be easily stored or used concurrently. While Caltrain continues to be a large consumer of electricity overall, their trains intermittently send excess regenerative braking energy to the grid (exports).

Energy exports are typically handled through the Net Billing Tariff (NBT), under which exports would be valued at an “Energy Export Credit” rate associated with the wholesale value of energy during each hourly interval of each month. However, regenerative braking is not defined as an eligible renewable resource in the California Public Utilities Code, which disqualifies it from NBT. This means that such exports are currently uncompensated by PG&E, San Jose Clean Energy or PCE.

In February 2025, Staff conducted extensive analysis of this policy issue and determined that it is appropriate to compensate transit agencies for exports from regenerative braking systems, as such exports reduce PCE’s procurement costs. Concurrently, AB 1372 (Papan), would reclassify regenerative braking as a renewable energy resource and therefore it would become eligible for NBT and associated export compensation. AB 1372 recently became a two-year bill, but staff’s recommended tariff amendments will address this issue in advance of any further action on AB 1372, providing fair compensation regardless of if or when the bill moves forward. It should be noted that, if this tariff amendment is approved by the Board, it is anticipated that PCE and SJCE will be removed from reference in the bill.

Another important issue is that PG&E’s billing system does not currently allow the NBT export compensation structure for commercial customers, which precludes the recommendations above. This is planned to be fixed by PG&E in April 2026.

SUMMARY OF PCE TARIFF CHANGES

The proposed amendments to the ZCILCFS Tariff create several Special Conditions, proposed to become effective October 2025 and designed to provide both interim and permanent solutions for providing export compensation for regenerative braking:

1. An **interim solution** would credit exports at a flat rate of \$0.06/kWh, which Staff has calculated as the average value of electricity produced by regenerative braking using current forward prices and available export data. This would remain in effect until PG&E’s billing systems allow for crediting exports on an hourly basis.
2. A **permanent solution** (unless modified) would go into effect once supported by PG&E’s billing systems, which would credit exports based on the average forward value of electricity used by the NBT program for other self-generating customers, such as those with solar.
3. Both the interim and permanent solution would be **superseded** if regenerative braking exports are reclassified as eligible for NBT by PG&E, at which point PCE would bill the customer according to NBT. This limits the need for further amendments to the Tariff if regenerative braking is made eligible for NBT by the Legislature.

Other minor grammatical changes were made to the existing Tariff provisions to make the language clearer, but these do not have a material impact.

On September 8th, PCE's Executive Committee unanimously recommended that PCE's Board of Directors adopt the proposed tariff revisions.

FISCAL IMPACT

The exports received by PCE would be purchased at a wholesale market rate for electricity and would offset purchases otherwise made through the California Independent System Operator (CAISO). As these prices should be approximately equivalent, Staff considers any fiscal impact de minimis.

ATTACHMENTS:

[Green Transit Tariff Effective October 2025 \(Clean\).docx](#)

[Caltrain Support Letter 7-25-25.pdf](#)

RESOLUTION NO. _____

**PENINSULA CLEAN ENERGY AUTHORITY, COUNTY OF SAN MATEO, STATE OF
CALIFORNIA**

**APPROVAL OF AMENDMENTS TO THE ZERO-CARBON INTENSITY LOW CARBON
FUEL STANDARD TARIFF**

RESOLVED, by the Peninsula Clean Energy Authority of the County of San Mateo, State of California, that

WHEREAS, Peninsula Clean Energy (PCE) was formed on February 29, 2016; and

WHEREAS, electrifying transportation systems and reducing greenhouse emissions through distributed energy generation are organizational priorities for PCE; and

WHEREAS, exporting energy from regenerative braking can provide reduced load and energy costs for Peninsula Clean Energy procurement costs; and

WHEREAS, compensation of energy exports at wholesale market rates otherwise applied to exported energy under Net Billing Tariff is fair and reasonable for zero-emission electricity;

NOW, THEREFORE, IT IS HEREBY DETERMINED AND ORDERED that the Board approves the attached amendments to the Zero-Carbon Intensity Low Carbon Fuel Standard Green Tariff to support the electrification of public transit and sustainable technologies in the Peninsula Clean Energy service territory.

Peninsula Clean Energy Authority

Zero-CI Low Carbon Fuel Standard Green Tariff

The Zero-CI Low Carbon Fuel Standard Tariff (Tariff) provides eligible public transit agencies with dedicated 100 percent solar and/or wind energy resources that meet California's Renewable Portfolio Standard ("RPS") for Portfolio Content Category 1 (PCC1), to support eligibility in the Low-Carbon Fuel Standard (LCFS) program administered by the California Air Resources Board (CARB).

Additionally, this tariff allows for surplus electricity generated through regenerative braking and delivered to PCE (exported) to be compensated at prevailing export rates.

APPLICABILITY

Eligibility: This Tariff is available to public transit agencies enrolled in Peninsula Clean Energy service. Only meters serving exclusively transportation electric load are eligible. The customer must also be certified as a Fuel Reporting Entity in the LCFS program, making the customer eligible to earn LCFS credits.

Enrollment and Cap: This Tariff is available to customers on a first-come, first-served basis, and has a maximum enrollment capacity of 100,000 MWh annually. Customers must request to be enrolled.

RATES

Usage: Customers will be charged for their electric usage (imports) at their otherwise applicable rate schedule.

SPECIAL CONDITIONS

- 1. Regenerative Braking:** Effective October 1st, 2025, customers with surplus electricity created through regenerative braking may receive export compensation. Surplus generation must be metered by PG&E and exported to PCE through an appropriate PG&E export-eligible interconnection agreement. Upon verification of exports and settlement with CAISO, customers are eligible for export compensation. Electricity exports will be credited using standard Net Billing Tariff Floating Vintage Generation export rates. These credits may only be netted out against customer usage charges within the same billing period and are ineligible for cash payment.
- 2. Interim Export Compensation:** Notwithstanding Special Condition #1, until PG&E billing systems are upgraded to support interval export billing for commercial customers, exports will be compensated at a rate of \$0.06/kWh.
- 3. Net Billing Tariff / Solar Billing Plan:** If the customer is enrolled in PG&E's Net Billing Tariff program, export compensation will instead be managed according to PCE's Solar Billing Plan Tariff.



BOARD OF DIRECTORS 2025

STEVE HEMINGER, CHAIR
RICO E. MEDINA, VICE CHAIR
MARGARET ABE-KOGA
PAT BURT
DAVID CANEPA
DAVID COHEN
JEFF GEE
SHAMANN WALTON
MONIQUE ZMUDA

MICHELLE BOUCHARD
EXECUTIVE DIRECTOR

July 25, 2025

Shawn Marshall
Chief Executive Officer
Peninsula Clean Energy
2075 Woodside Rd
Redwood City, CA 94061

Lori Mitchell
Director
San Jose Clean Energy
200 E. Santa Clara St.
San José, CA 95113

Re: Support for Caltrain Rate Amendment

Dear Ms. Marshall and Ms. Mitchell,

On behalf of the Peninsula Corridor Joint Powers Board (Caltrain), I am writing to express our gratitude to our Community Choice Aggregator (CCA) partners, Peninsula Clean Energy (PCE) and San Jose Clean Energy (SJCE), for your incredible support of public transit and to voice our support for the rate amendments before your respective Board and City Council regarding Caltrain's regenerative braking energy. Caltrain could not be where it is today, up 75% in ridership over last year, without your help in supplying 100% renewable energy to power the electrification of Caltrain. Our collaboration not only helps improve air quality, but also demonstrates the power of community-facing organizations working together to benefit the public.

We deeply appreciate the work of your staff to develop an option to compensate Caltrain for the energy our trains regenerate and send back to the grid. Caltrain is supportive of the proposed flat interim credit of \$0.06/kWh effective no later than November 1, 2025 followed by transitioning those credits to standard Net Billing Tariff Floating Vintage Generation rates when Solar Billing Plan becomes available to non-residential customers. This compensation framework reflects a thoughtful, phased approach that values Caltrain's energy exports while minimizing unnecessary administrative burden to the CCAs .

With the approval of this rate amendment by the PCE Board and and San José City Council,

PENINSULA CORRIDOR JOINT POWERS BOARD

1250 San Carlos Avenue
San Carlos, CA 94070 (650) 508-6200

July 25, 2025

Caltrain commits that we will not sponsor any legislation that would adversely impact CCA autonomy in its rate setting authority. We feel that this local solution achieves the goals of supporting regional transit, renewable energy innovation, and an environmentally sound future. We would also like to thank Assemblymember Papan for her leadership on this issue and her tremendous support for public transit and renewable energy generation.

We are very grateful for your willingness to work with us on solutions that can compensate clean, efficient systems like Caltrain for the power we return—furthering sustainability in public infrastructure.

Thank you for your continued partnership, and for helping make a cleaner, smarter future for Bay Area mobility possible. We look forward to working together to deepen this collaboration as Caltrain's electrified service continues.

Please contact Devon Ryan, Government and Community Affairs Officer (650-730-6172, ryand@caltrain.com), with any questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'MBouchard', with a stylized, cursive script.

Michelle Bouchard
Executive Director

cc: Peninsula Corridor Joint Powers Board of Directors
San José City Council
Peninsula Clean Energy Board of Directors



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Executive Committee
FROM: Jennifer Stalzer, General Counsel
SUBJECT: Approval of Amendments to the Records Retention Policy 20(d)

RECOMMENDATION

Approval of Amendments to the Records Retention Policy 20(d) (Action)

BACKGROUND

In 2018, PCE's Records Retention Policy (Policy Number 20 d.) was adopted by the Board. The Records Retention Policy is now being updated to reflect the organization's growth in the context of California Public Records Act (CPRA) compliance.

DISCUSSION

The Records Retention Policy, Policy 20(d), is being revised to reflect the robust nature of PCE's work, as well as the addition of several new departments, programs, and initiatives since 2018. The Policy continues to adhere to the CPRA and recognize PCE's position as a public entity. The edited and expanded Retention Policy describes and categorizes records as they are currently utilized and maintained by PCE. The revisions were authored in conjunction with PCE leadership, including a number of PCE's directors with specific records expertise who provided input on the revised policy.

The revised policy has been reviewed and recommended for approval by the Executive Committee on September 8, 2025. Minor edits (reflected in the attached redline, third attachment) were made after Executive Committee approval and the final draft (fourth attachment) is now before this Board for its review and approval.

FISCAL IMPACT

While there is no immediate fiscal impact, implementation of the revised Records Retention Policy, especially during early implementation, may require additional staff time.

ATTACHMENTS:

[2018 PCE-Policy-20.d-PCE-records-retention-policy.pdf](#)
[PCE Records Retention Policy Clean 082225 Executive Committee Version.docx](#)

RESOLUTION NO. _____

**PENINSULA CLEAN ENERGY AUTHORITY, COUNTY OF SAN MATEO, STATE OF
CALIFORNIA**

APPROVAL OF AMENDMENTS TO THE RECORDS RETENTION POLICY 20(D)

RESOLVED, by the Peninsula Clean Energy Authority of the County of San Mateo, State of California, that

WHEREAS, Peninsula Clean Energy (PCE) was formed on February 29, 2016; and

WHEREAS, promoting organizational efficiency and compliance are strategic priorities for PCE; and

WHEREAS, PCE's Records Retention Policy (Policy 20(d)) was originally approved by the Board on December 20, 2018; and

WHEREAS, PCE's records footprint has expanded significantly over the past eight years; and

WHEREAS, the expansion and revision of PCE's Records Retention Policy, Policy 20(d), are required to increase organizational efficiency and compliance; and

NOW, THEREFORE, IT IS HEREBY DETERMINED AND ORDERED that the Board approves PCE's Records Retention Policy, Policy 20(d) as revised.

Records Retention Policy

Overview and Purpose –

PCE will retain its records for set periods of time in order to ensure adequate and manageable recordkeeping. Records outside the specified retention periods may be discarded according to the procedures in this policy. Records may be kept in electronic or paper format (or both).

a. Retention periods

<u>Record Type</u>	<u>Retention Period</u>	<u>Sample Descriptions</u>
Executed contracts	10 years after termination	Power supply contracts, contracts with vendors or consultants
Vendor invoices	2 years after contract completion	Vendor invoices for payment
Non-disclosure agreements	In perpetuity	NDA with vendor, employee, Board member or advisor
Board-approved decisions	In perpetuity	Resolutions, meeting minutes, and other items approved at regular or special Board meetings
Board and committee meeting materials	In perpetuity	Agendas, staff reports, and other material provided to Board members for meetings
Board-approved budgets	In perpetuity	Final, approved budgets
Document drafts	30 days after final version is approved	Draft of contracts, programs, RFPs, etc.
General electronic correspondence	2 years	Relevant email correspondence at staff discretion
Customer-specific usage information and data	2 to 10 years, but no longer than reasonably necessary	Electronic information and reporting from Director of Customer Care, customer bill analyses, customer consent for third-party disclosures
Marketing material	2 years after public distribution	Flyers, brochures, electronic ads
General educational or informational material	2 years	Brochures, reports, electronic information
Personnel information	5 to 10 years after employee end date	Offer letter, resume, evaluations

2. Procedures for discarding records

- a. When records are no longer required to be kept under the requirements above, they may be discarded.
- b. PCE will undertake a record purge at least every five years, identifying those records that may be discarded. The Office Manager will oversee the purge, in consultation with PCE's legal counsel.
- c. Records with confidential or sensitive information will be discarded in a secure manner, such that the confidential or sensitive information is no longer viewable or accessible after being discarded.

Policy 20 d.

Peninsula Clean Energy - Records Retention Policy

Peninsula Clean Energy (PCE) Records will be retained according to the following schedule. After the required retention date has passed all documents or electronic files will be deleted or discarded. If PCE is required to retain records not listed herein or retention timelines for those records that are listed herein change due to updates in law, PCE will retain those records pursuant to the current law. This Policy shall replace the Records Retention policy adopted December 20, 2018.

Record Type	Required Retention	Sample Descriptions
Executed Agreements	Operational, including vendor agreements (non-energy) – 10 years after termination date of the agreement	Agreements with vendors or consultants for goods and/or services including leases and property agreements
	Energy Procurement agreements – In perpetuity	Power supply agreements
Invoices from Vendors	Operational agreements – 2 years after term ends	Vendors or consultant invoices for payment for goods and services
	Energy Procurement Agreements – In perpetuity	Power Agreements and vendor invoices for payment
	Customer Program Implementers – In perpetuity	Customer program Implementer invoices for payment
Participation Agreements	Program participation agreement – 5 years after termination of the agreement or fulfillment of incentive	Program participation agreements and associated eligibility documentation.
Unsuccessful Bids and Proposals	Non-Energy Procurement – 2 years after close of solicitation	Requests for Proposals (RFPs), Open Season Bids, other competitive procurements
	Energy Procurement – 5 years after close of solicitation	
Non-Disclosure Agreements	In perpetuity	NDA with vendor, employee, Board member or advisor

Board/Committee Approved Decisions	In perpetuity	Resolutions, meeting minutes, and other items approved at regular or special Board/Committee meetings
Board and Committee Meeting Materials	In perpetuity	Agendas, staff reports, and other material provided to Board members in preparation for meetings, “in place” materials
Board Approved Budgets	In perpetuity	Final, approved budgets
Drafts of Documents	30 days after the final version is approved	Draft of agreements, programs, RFPs, etc. Duplicate versions of drafts should be deleted immediately.
General Electronic (E-mail) Correspondence	1 year	Email correspondence
Instant/Direct Messaging	90 days	Slack Messages
Customer Data Requests	5 years	Cost comparisons, bill analyses, usage history, billing history, including ad hoc requests
Customer Information	10 years	Customer lists, program data, account balances (identifiable info/PII)
Data Analytics Platform Information (Dashboard, Reports)	In perpetuity	Detailed customer information
AMI Data Lists and Reports supporting CPUC Savings Claims	7 years or longer, as required by the California Public Utilities Commission	Non-aggregated customer AMI data
Other AMI Data Lists and Reports	Deletion after staff use is completed	Non-aggregated customer AMI data
Process Data	5 years	Non-aggregated, non-AMI customer data pulled from PCE’s Data Analytics Platform

Marketing Material	2 years after date of public distribution	Flyers, brochures, electronic advertisements
General Educational or Informational Material	2 years	Brochures, reports, electronic information
Employee Files	7 years after end of employment	Resume, offer letter, change of status, benefits, evaluations, new hire forms
Recruitment Files	3 years after the end of employment for recruited position	Application, supporting materials, job announcement, testing materials, rating sheets, interview notes
Timecards and Other Payroll Records	Current year of employment + 3 years	Timecards and employee wage records
I-9 Forms	The longer of 3 years after employee hire date or 1 year after termination or end of employment	Forms retained for I-9 work authorization
Background Checks	5 years from consent or report issued, unless continuing consent obtained	Background consent forms, reports
Employee Leaves of Absence	3 years after employee end date	Forms, leave plans, etc. related to an employee leave of absence
Workers' Compensation Related Records	7 years after termination/end of employment	Employer's report of injury and related records
Miscellaneous Personnel Information	7 years after termination/end of employment	Benefit plan documents, training materials

Procedures for discarding records

- When records are no longer required per the requirements above, they may be discarded.
- PCE will undertake a record purge annually, identifying those records that may be discarded. The Board Clerk will oversee the purge, in consultation with PCE's legal counsel.
- When available, records may be automatically purged consistent with available auto-delete functions (e.g., auto-delete features on Gmail, Slack).
- Records with confidential or sensitive information will be discarded in a secure manner, such that confidential or sensitive information is no longer viewable or accessible after being discarded.

Policy 20 d.

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Board Approved Budgets	In perpetuity	Final, approved budgets
Drafts of Documents	30 days after the final version is approved	Draft of agreements, programs, RFPs, etc. Duplicate versions of drafts should be deleted immediately.
General Electronic (E-mail) Correspondence	1 year	Email correspondence
Instant/Direct Messaging/Text/SMS Messaging	90 days	Slack, Teams, Zoom Messages ¹
Customer Data Requests	5 years	Cost comparisons, bill analyses, usage history, billing history, including ad hoc requests
Customer Information	10 years	Customer lists, program data, account balances (identifiable info/PII)
Data Information	In perpetuity	Detailed customer information; data warehouse
AMI Data Lists and Reports supporting CPUC Savings Claims	7 years or longer, as required by the California Public Utilities Commission	Non-aggregated customer AMI data
Other AMI Data Lists and Reports	Deletion after staff use is completed	Non-aggregated customer AMI data

¹Employees should not use personal text messaging and/or email accounts to conduct PCE-related business.

Process Data	5 years	Non-aggregated, non-AMI customer data supporting PCE's Data Analytics Platform
Marketing Material	2 years after date of public distribution	Flyers, brochures, electronic advertisements
General Educational or Informational Material	2 years	Brochures, reports, electronic information
Employee Files	7 years after end of employment	Resume, offer letter, change of status, benefits, evaluations, new hire forms
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Procedures for discarding records

- a. PCE records will be retained and disposed of in accordance with this schedule and applicable law.
- b. Records may be preserved beyond the stated retention period when required by law or operational need after consultation with the General Counsel.

- c. Drafts should be deleted when a final version has been completed and saved per the retention schedule above.
- d. PCE will undertake a periodic record review to identify those records that may be discarded. PCE Staff, including administrative staff and IT, will oversee the purge, in consultation with PCE's General Counsel.
- e. When available, records may be automatically purged consistent with available auto-delete functions (e.g., auto-delete features on Gmail, Slack, Teams, etc.).
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- f. Records with confidential or sensitive information will be discarded in a secure manner, such that confidential or sensitive information is no longer viewable or accessible after a record is discarded.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Nelly Wogberg, Board Clerk
SUBJECT: Approval of Minutes from the July 24, 2025 Board of Directors Meeting

RECOMMENDATION

Approval of Minutes from the July 24, 2025 Board of Directors Meeting.

ATTACHMENTS:

[07-24-2025 BOD Draft Minutes.pdf](#)

**Regular Meeting of the Board of Directors of the
Peninsula Clean Energy Authority (PCEA)
Minutes**

Thursday, July 24, 2025

6:30 p.m.

Zoom Video Conference and Teleconference

CALL TO ORDER

Meeting was called to order at 6:34 p.m. in virtual teleconference, in the Peninsula Clean Energy Authority lobby, in the Los Banos City Hall conference room A, and 17907 Holli Blue Rd., Champion, MI 49861.

SWEARING IN OF NEW BOARD MEMBERS

Jennifer Stalzer, General Counsel, presided over the swearing-in ceremony for Board Alternates Teresa Proano from Daly City and Gary Brizzee from Los Banos.

ROLL CALL

Participating:

Lisa Gauthier, San Mateo County
Jackie Speier, San Mateo County, participating from Michigan
Rick DeGolia, Atherton
Tom McCune, Belmont
Coleen Mackin, Brisbane
Donna Colson, Burlingame, *Chair*
Teresa Proano, Daly City
Carlos Romero, East Palo Alto
Suzy Niederhofer, Foster City
Patrick Jonsson, Half Moon Bay
Leslie Ragsdale, Hillsborough
Gary Brizzee, Los Banos, participating from Los Banos
Betsy Nash, Menlo Park
Bob Nguyen, Millbrae
Craig Taylor, Portola Valley
Elmer Martinez Saballos, Redwood City
Marty Medina, San Bruno, *Vice Chair*
Adam Loraine, San Mateo
Hassan Aburish, Woodside

Absent:

Ken Gonzalez, Colma
Christine Boles, Pacifica
John Dugan, San Carlos
James Coleman, South San Francisco

A quorum was established.

PUBLIC COMMENT: None

ACTION TO SET THE AGENDA AND APPROVE REMAINING CONSENT AGENDA ITEMS



Public Comment: None

MOTION: Director Gauthier moved, seconded by Director Niederhofer to set the Agenda, and approve Agenda Item Numbers 1-5.

1. Approval of Four Member Agency Energy Grants Agreements in the Amount of \$3,876,862 for Clean Energy Projects Pursuant to the 2023 Surplus Funds Allocation
2. Approval of Resolution Approving Peninsula Clean Energy's 2024 Power Source Disclosure Annual Report, Confirming the Accuracy of the Information Provided in the 2024 Power Source Disclosure Report and Delegating Authority to the Chief Executive Officer, or Designee, to Submit the Attestation to the California Energy Commission
3. Approval of EV Ready Program Fund Reservation Agreements with (1) GoPowerEV in an Amount Not-to-Exceed \$1,500,000 and (2) Spring Valley Homeowners Association in an Amount Not-to-Exceed \$263,500 for a Total Not-to-Exceed of \$1,763,500 in Customer EV Incentives
4. Approval of a Contract Amendment in the Amount \$400,000 with CLEAResult to Provide Technical Assistance Services in the EV Ready Program Through June 30, 2027
5. Approval of the Minutes for the June 26, 2025 Meeting

MOTION PASSED: 19-0 (Absent: Colma, Pacifica, San Carlos, South San Francisco)

JURISDICTION	BOARD MEMBER	YES	NO	ABSTAIN	ABSENT
San Mateo County	Director Gauthier	X			
San Mateo County	Director Speier	X			
Atherton	Director DeGolia	X			
Belmont	Director McCune	X			
Brisbane	Director Mackin	X			
Burlingame	Director Colson	X			
Colma	Director Gonzalez				X
Daly City	Director Proano	X			
East Palo Alto	Director Romero	X			
Foster City	Director Niederhofer	X			
Half Moon Bay	Director Jonsson	X			
Hillsborough	Director Ragsdale	X			
Los Banos	Director Brizee	X			
Menlo Park	Director Nash	X			
Millbrae	Director Nguyen	X			
Pacifica	Director Boles				X
Portola Valley	Director Taylor	X			

Redwood City	Director Martinez Saballos	X			
San Bruno	Director Medina	X			
San Carlos	Director Dugan				X
San Mateo	Director Loraine	X			
South San Francisco	Director Coleman				X
Woodside	Director Aburish	X			
Total		19			4

REGULAR AGENDA

6. [Chair Report](#)

Chair Colson gave a report including an update on the general counsel position, and the Board Standing Committee Review Ad-Hoc Committee.

7. [CEO Report](#)

Shawn Marshall, Chief Executive Officer, gave a report including operational challenges that led to a Home Upgrade Program restructure, customer outreach for PG&E's new bill payment, AMP Customer Outreach, legislative updates, board education opportunities, and draft upcoming meeting topics.

8. [Community Advisory Committee Report](#)

Jason Mendelson, Community Advisory Committee (CAC) Chair, provided a recap of the July 10, 2025 CAC meeting, including a recommendation for the process on selecting a banking partner.

9. [Discussion of HB-1 Reconciliation Bill and Trump Administration Executive Order 14315: Impacts on PCE Procurement and Programs \(Discussion\)](#)

Shawn Marshall, CEO, introduced the discussion of HB-1 and EO 14315 as well as staff from Thorn Run Partners: Jim Davenport, Partner, and Kyler Phillips, Public Policy Manager. Roy Xu, Senior Director of Power Resources, Rafael Reyes, Senior Director of Energy Programs and Peter Levit, Senior Programs Manager for Distributed Energy Resources, continued the presentation.

Public Comment: None

10. [Approval of a Resolution Delegating Authority to the Chief Executive Officer to Execute two Power Purchase Agreements for the IP Darden III and IP Darden IV Solar Plus Storage Projects with IP Darden III, LLC and IP Darden IV, LLC with a Delivery Term of At Most Twelve \(12\) Years and a Commercial Operation Date of June 1, 2028, in a Total Amount Not-to-Exceed \\$319 Million \(Action\)](#)

Mehdi Shahriari, Senior Manager, Planning and Analytics and Roy Xu, Senior Director of Power Resources, gave a presentation on the Power Purchase Agreements with Darden III, LLC and IP Darden IV, LLC. Colin Cardwell from Intersect Power also introduced himself and Intersect Power.

Public Comment: None

MOTION: Director DeGolia moved, seconded by Director Taylor to Approve the Resolution Delegating Authority to the Chief Executive Officer to Execute two Power Purchase Agreements for the IP Darden III and IP Darden IV Solar Plus Storage Projects with IP Darden III, LLC and IP Darden IV, LLC with a Delivery Term of Up to Twelve (12) Years and a Commercial Operation Date of June 1, 202, in a Total Amount Not-to-Exceed \$333 Million.

MOTION PASSED: 19-0 (Absent: Colma, Pacifica, San Carlos, South San Francisco)

JURISDICTION	BOARD MEMBER	YES	NO	ABSTAIN	ABSENT
San Mateo County	Director Gauthier	X			
San Mateo County	Director Speier	X			
Atherton	Director DeGolia	X			
Belmont	Director McCune	X			
Brisbane	Director Mackin	X			
Burlingame	Director Colson	X			
Colma	Director Gonzalez				X
Daly City	Director Proano	X			
East Palo Alto	Director Romero	X			
Foster City	Director Niederhofer	X			
Half Moon Bay	Director Jonsson	X			
Hillsborough	Director Ragsdale	X			
Los Banos	Director Brizee	X			
Menlo Park	Director Nash	X			
Millbrae	Director Nguyen	X			
Pacifica	Director Boles				X
Portola Valley	Director Taylor	X			
Redwood City	Director Martinez Saballos	X			
San Bruno	Director Medina	X			
San Carlos	Director Dugan				X
San Mateo	Director Loraine	X			
South San Francisco	Director Coleman				X
Woodside	Director Aburish	X			
	Total	19			4

11. [Board Members' Reports](#)

Chair Colson reminded Board members to look at the information reports for helpful information.

Director Loraine noted that Peninsula Clean Energy will be at the Silicon Valley Youth Climate Action Event on August 9th and that many are partnering in that event and offered for others to join in Campbell. Director Ragsdale also endorsed this

ADJOURNMENT

Meeting was adjourned at 8:30 p.m.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Shawn Marshall, Chief Executive Officer
SUBJECT: CEO Report (Discussion)

BACKGROUND

This report is provided monthly to the Board of Directors and is informational only.

DISCUSSION

During the Board meeting, CEO Shawn Marshall will provide an update on a variety of PCE topics, including but not limited to: the Self Generation Incentive Program (SGIP) update, PCE office facility update, Pre-pay #2 briefing session, October Board retreat plans, and other upcoming events of interest.

PCE In the Community

9/20	Bayview HOA EV Charging Ribbon Cutting, Millbrae
9/26	Salute to Seniors: 2025, Los Banos
9/27-28	Mid-Autumn Festival, Millbrae
10/2	The Friendship Club Community Updates Workshop, Daly City
10/11	Halloween Trunk or Treat, Los Banos
10/17	Dos Palos Ribbon Cutting, Los Banos
10/18	Peninsula Green@Home, San Mateo County
10/18	350 Silicon Valley Home is Where the Change Is, Redwood City
10/21	PCE Rebates Presentation, Burlingame
10/27	Belle Haven Home Upgrade Workshop, Menlo Park
10/28	Belle Haven Home Upgrade Workshop, Menlo Park

PCE Staffing Update

Welcome to...

- Stephen Campbell, Senior Analyst, Innovation Strategy, started August 19
- Deci Raisa Lim, Data Engineer, Data and Technology, starting October 2

Congratulations to...

Jana Kopyciok- Lande, promoted to Director of Innovation and Strategy

Open Positions - Please share!

[Associate Manager / Manager, Energy Programs, VPPs](#)



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: August 14, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Marc Hershman, Director of Government Affairs
SUBJECT: Update on Legislative Activities (Discussion)

BACKGROUND

With the conclusion of the scheduled 2025 legislative session in Sacramento, Peninsula Clean Energy Director of Government Affairs, Marc Hershman, and our lobbyist in Sacramento, Mark Fenstermaker, Principal and Co-Founder of Pacific Policy Group, will provide the Board of Directors with an oral report on our 2025 legislative activities and results.

DISCUSSION

“We must do more to lower energy costs,” said Assembly Speaker Robert Rivas as he opened the 2025-26 legislative session. Similarly, Senate *pro tem* Mike McGuire said at the time “we need to lower energy costs.”

These themes continued throughout the legislative session, which closed with a flurry of activity on climate and other energy issues. Along the way, the Legislature also grappled with shifting priorities, including wildfire impacts in Southern California and new initiatives emerging from Washington, D.C.

The state Legislature returned from summer recess on August 18 and, in its first week back, focused on responding to redistricting changes in other states. Lawmakers quickly passed, and Governor Newsom signed, a bill placing on the November 2025 statewide ballot a proposal for a new Congressional district map to take effect for the November 2026 election. This effort, now designated Proposition 50, could well dominate political attention in California and the nation for the next two months.

Energy legislation and Peninsula Clean Energy priority bills were front and center during the last remaining weeks of the 2025 session. On the very last day of the session, which turned out to be a necessary additional day, the Legislature passed 6 bills with climate and energy implications.

Here is an update on several key legislative and regulatory issues where PCE has been actively engaged:

Pathways Initiative / Formerly SB 540 (Becker) / Passed as AB 825 (Petrie-Norris) by vote of 34-0 in Senate and 67-2 in Assembly

In the last week of the legislative session, the broad coalition of CCAs, including Peninsula Clean Energy, along with labor, business, and environmental groups held together and expanded. A copy of the floor alert signed by PCE and circulated in support of the bill is attached to this report.

The bill was amended several times during the session, but the final version is much closer to the language as originally introduced (which PCE supported) than to the version that passed out of the Senate earlier in the year. As enacted, the measure authorizes CAISO to transition its markets into a regional organization under the Pathways initiative. Key anticipated benefits include lower energy costs, improved grid reliability, and enhanced decarbonization both within California and across the western region.

The legislation also builds in oversight and safeguards. California cannot unilaterally and quickly withdraw from the market, but participation is conditioned on oversight by both CAISO and the CPUC. A last-minute amendment requires the CPUC to issue a formal decision confirming that California's statutory requirements for participation in an independent regional organization are met before CAISO can move forward. In addition, CAISO must wait until January 1, 2028 before officially joining the Regional Organization.

Affordability packages, formerly AB 825 (Petrie-Norris) + SB 254 (Becker), passed as SB 254 (Becker, Wahab and Petrie-Norris)

This bill, which merged Senate and Assembly proposals, seeks to address many of California's highest-priority climate and energy issues. **SB 254** recapitalizes the wildfire fund that serves as an insurance pool for Investor-Owned Utilities (IOUs) by splitting costs evenly between ratepayers and shareholders, requires IOUs to securitize their debts, increases oversight of IOU profits, streamlines permitting for certain clean energy projects, and tightens timelines for energizing new developments.

A major concern for CCAs in earlier versions of the bill was the proposed creation of a Statewide Demand Side Management Program Review Task Force within the Energy Commission. Had it been adopted, this provision could have subjected locally designed CCA programs — including PCE initiatives — to review or even second-guessing by a state-appointed body lacking local expertise, undermining local program authority. Due to strong advocacy by PCE and CalCCA, this proposal was removed from the final version of **SB 254**.

Cap-and-Trade/Invest Re-authorization / AB 1207 (Irwin, Rivas, Limon, McGuire)

Governor Newsom and legislative leaders have been publicly sharing their interest in reauthorizing the State's cap-and-trade legislation, which the Governor re-titled as "cap-and-invest" in his 2025 budget. The program, put in place through 2030, has seen flagging market interest. The August 2025 auction realized approximately \$107 million less revenue than the similar auction in 2024. Some have cited market uncertainty as the reason for the lower revenues.

In the session's waning moments, the Legislature passed **AB 1207**, which extends the state's cap-and-trade program through 2045 by the necessary two-thirds vote. Along with the extension legislation, **SB 840** was passed. This bill applies cap-and-trade funds to high-speed

rail, and other programs that address greenhouse gas emissions.

Self-Generation Incentive Program (SGIP)

The CPUC's [Self-Generation Incentive Program \(SGIP\)](#) provides incentives to support businesses and homeowners for adopting distributed energy resources (DR).

Previously, CPUC rules excluded CCA customers from accessing certain SGIP funds. PCE, along with other CCAs and CalCCA, engaged legislators and regulators to correct this inequity so that low-income customers could benefit and lower their energy bills.

On August 29, the CPUC issued a [Proposed Decision](#) updating several program provisions. Most importantly, the decision removes the “Qualified Demand Response” requirement for low-income CCA customers to participate in the Residential Solar and Storage Equity program. This change creates a clearer pathway for low-income CCA customers to receive funding and helps mitigate the financial harms caused by the earlier rules. Legislative pressure was likely instrumental in driving this regulatory fix.

We will continue to engage on this issue as the proposed decision does not help certain CCA customers who applied to an earlier round of SGIP funding.

FISCAL IMPACT

None

ATTACHMENTS:

[Updated PCE Support for Workable Pathways Process -- Aug 15, 2025 \(1\).docx](#)

[SB540_9.5_NASCAR.pdf](#)

[SB_540.Joint_Statement.AsmUE.July16.pdf](#)

[AB825_Support Letter_9.10.25.pdf](#)

[PCE SB 254 Support Letter -- Sept 11, 2025.docx](#)

[AB825_Coalition_RequestforSignature.pdf](#)

[September 2025 Bill Matrix.docx](#)



August 15, 2025

The Honorable Scott Wiener
California State Senate
1021 O Street, Suite 8620
Sacramento, CA 95814

Re: Support for an Expanded Regional Energy Market (SB 540 – Becker)

Dear Senator Wiener,

On behalf of Peninsula Clean Energy Authority (PCE), a community choice aggregator (CCA) serving approximately 800,000 Californians in San Mateo County and the City of Los Banos in Merced County, we write to respectfully request that you help pass a workable version of SB 540 before the end of the legislative year to allow California to participate in an expanded regional energy market.

California's push to decarbonize its electricity grid is among the most ambitious in the world, with a legal mandate to achieve 100% clean electricity by 2045. Doing this cost-effectively and reliably within California's borders alone presents significant challenges, especially given the limitations of in-state land, transmission, and resource diversity. That is why a historic coalition of labor, business, climate advocates, clean energy advocates, public utilities, community choice aggregators and consumer advocates from across the state came together to support SB 540 as it was originally conceived.

California is facing skyrocketing electricity costs and climate-driven threats to the reliability of our electric grid. That is why we must fix and pass a workable version of SB 540 this year that enables the California Independent System Operator (CAISO) to join an expanded regional energy market which will lower ratepayers' electric bills, improve the reliability of our grid, and increase California's access to affordable clean power.

Under SB 540 California would retain full control over its energy policies, including climate laws, procurement, transmission and resource adequacy.

Participation in an expanded regional power market is one of our best opportunities to meaningfully lower electricity costs for consumers and businesses. A recent independent study for the California Energy Commission (CEC) found that by participating in an expanded regional power market with a large footprint, California could lower energy costs by more than \$1 billion annually.

Participation in a broad regional power market will also increase our access to affordable clean power, helping to improve the reliability of our grid, avoid power outages, and meet our clean energy and

climate goals. Additionally, while recent federal legislation drastically cut clean energy programs in California, participating in a regional market will help counter these cuts by lowering the cost of developing and delivering clean energy.

California already participates in the Western Energy Imbalance Market (WEIM), a much narrower version of a regional market. The WEIM covers last-minute energy sales and has delivered over \$2 billion in savings for California alone. A workable version of SB 540 will extend this successful approach to a broader market, increasing the affordability, reliability, and clean energy benefits California receives.

The time to act is now. If we do not enact a workable version of SB 540 this year, other western partners will join the Markets + power market instead of ours, erasing the affordability, reliability, and clean energy benefits Californians would receive from participating in a broad western regional market.

SB 540 was held in the Assembly in July pending final negotiations among the Governor, Speaker, and pro Tem. We strongly urge you to let leadership know how important it is to you, your constituents, and our customers to pass a workable SB 540 this year so we can realize the affordability, reliability, and clean energy benefits of an expanded regional market.

If you have any questions, please contact Mike Mielke with our Policy and Government Affairs team. Mike can be reached at mmielke@pensisulacleanenergy.com; 202-607-1064.

Sincerely,

Marc Hershman
Director of Government Affairs



Pass a Workable Version of SB 540 NOW

For Affordable, Reliable, Clean Energy

We urge the Legislature to pass a workable SB 540 that lowers electric bills, strengthens grid reliability, and expands access to affordable clean power. A workable bill protects California consumers and works for our western state partners — the broader the market footprint, the more it will benefit California consumers and energy goals. SB 540 will provide:

- **Lower Electricity Costs for Californians:** SB 540 lowers energy costs for consumers and businesses by more than \$1 Billion annually. A recent [independent study done for the California Energy Commission](#) found that participating in a regional energy market with a large footprint would lead to increased energy supply, greater market efficiency and less curtailment and waste of renewable energy.
- **Improve Grid Reliability and Reduce Power Outages:** SB 540 improves the reliability of our electricity grid and reduces blackouts by connecting California to a broader regional electricity market, giving the grid operator access to a wider pool of energy resources, strengthening our ability to handle climate-driven disruptions and reducing the risk of blackouts.
- **More Affordable Clean Energy:** A regional energy market will help California develop more renewable energy we can use or sell to other states, and expanding our access to clean electricity supply from other Western states will reduce our reliance on fossil fuels for grid reliability, helping to improve our air quality and further our climate goals.

Act Now to Protect California's Climate Leadership

California has a critical choice to make. Passing a **workable** SB 540 this year will lower costs for ratepayers, improve grid reliability, and expand access to affordable clean energy. But if we don't pass a workable SB 540 **this year**, we risk losing these benefits as other Western states join a competing Arkansas-based market instead of ours.

The time is now. Urge legislative leaders to act—California's affordability, reliability, and clean energy future depend on it.

July 16, 2025

Contact: Ned Wigglesworth

Ned@SpectrumCampaigns.com

**JOINT COALITION STATEMENT
AMEND AND PASS SB 540
For More Affordable, Reliable Clean Energy for California**

SACRAMENTO – A coalition of labor, business, environmental groups, clean energy advocates, public utilities, community choice aggregators and consumer advocates released the below joint statement in response to the announcement that discussions would be held among decision-makers and stakeholders over legislative recess to amend and ultimately pass SB 540:

“We want to thank the Governor, Speaker, Senate pro Tem, author Senator Becker and Assemblymember Petrie-Norris for all the work and leadership on this issue, and for their commitment to work on the bill over recess to get it right.

California is facing skyrocketing electricity costs and climate-driven threats to the reliability of our electricity grid. California must fix and pass a workable version of SB 540 this year to lower electricity costs for consumers and businesses, increase reliability of the grid, and further our clean energy goals – or our state will pay the price.

The move to pull SB 540 from consideration for the moment will allow decision-makers and stakeholders to get this done in a way that ensures California consumers and businesses can reap the benefits: **more than \$1 Billion annually in savings for Californians¹, increased grid reliability and fewer blackouts², and more clean energy.**

We need to get this done right this year. If we do not, other participants will join another regional market, we will lose this unique opportunity and California consumers, businesses and clean energy goals will pay the price.”

SB 540 authorizes the state to participate in a regional electricity market, provided it protects California consumers and energy policies. California would keep full control over its energy policies, including climate laws, procurement, transmission, and resource adequacy.

#-#-#

Advanced Energy United
Balancing Authority of Northern California (BANC)
CA & NV State Association of Electrical Workers (IBEW)
California Chamber of Commerce
California Coalition of Large Energy Users (CLEU)
California Community Choice Association (CalCCA)
California Environmental Voters

¹ Brattle Group: “[Updated Day-Ahead Market Impact Study](#) (Slide 9)”, (Prepared for California Energy Commission, June 5, 2025).

² Stanford Climate & Energy Policy Program: “[Grid Regionalization in the West: Reliability Benefits from Increased Cooperation in Electricity Markets and Operations](#)”, (Prepared for California Energy Commission, January 24, 2025).

California Large Energy Consumers Association (CLECA)
California Municipal Utilities Association (CMUA)
Central Coast Community Energy
Ceres
Clean Energy Buyers Association (CEBA)
Climate Hawks Vote
Data Center Coalition
Environmental Defense Fund (EDF)
Independent Energy Producers Association (IEPA)
Leap
MCE
Natural Resources Defense Council (NRDC)
PacifiCorp
Peninsula Clean Energy
Pioneer Community Energy
San Diego Community Power
Sierra Nevada Brewing Company
Silicon Valley Clean Energy (SVCE)
Silicon Valley Leadership Group (SVLG)
TechNet
Western Freedom
Western Resource Advocates (WRA)

SUPPORT: AB 825 - (Petrie-Norris; Rivas; Becker) as amended, September 10, 2025



DATE: September 10, 2025

TO: The Honorable Assemblymember Cottie Petrie-Norris;
The Honorable Assembly Speaker Robert Rivas;
The Honorable Senator Josh Becker

RE: **SUPPORT: AB 825 (Petrie-Norris; Rivas; Becker) as amended, September 10, 2025**

On behalf of a broad coalition of labor, business, climate advocates, clean energy advocates, public and private utilities, community choice aggregators (CCAs) and consumer advocates from across the state, **we offer our strong support of AB 825 (as amended, September 10, 2025). Your leadership resulted in a bill that lowers electric bills, strengthens grid reliability, and expands access to affordable clean power.**

As amended, AB 825 builds on the recommendations of the West-Wide Governance Pathways Initiative ("Pathways Proposal") by authorizing participation in a new independent Regional Organization. This voluntary Regional Organization would be responsible for establishing energy market rules that benefit the customers of all participating entities. California's participation would be voluntary, and California would keep full control over its energy policies, including climate laws, procurement, transmission, planning, and resource adequacy.

AB 825, as amended, will provide:

- **Lower Electricity Costs for Californians:** AB 825 lowers energy costs for consumers and businesses by more than \$1 Billion annually. A recent [independent study done for the California Energy Commission](#) found that participating in a regional energy market with a large footprint would lead to increased energy supply, greater market efficiency and less curtailment and waste of renewable energy.
- **Improve Grid Reliability and Reduce Power Outages:** AB 825 improves the reliability of our electricity grid and reduces blackouts by connecting California to a broader regional electricity market, giving the grid operator access to a wider pool of energy resources, strengthening our ability to handle climate-driven disruptions and reducing the risk of blackouts. [A Stanford Woods Institute study](#) found

that [participating in a regional energy market could reduce grid stress by 40% during California's highest-risk periods](#).

- **More Affordable Clean Energy:** A regional energy market will help California develop more renewable energy we can use or sell to other states, and expanding our access to clean electricity supply from other Western states will reduce our reliance on fossil fuels for grid reliability, helping to improve our air quality and further our climate goals.

On behalf of Californians, we appreciate your commitment to the state's energy goals and dedication to making energy more affordable. AB 825 will advance western energy market cooperation and create a structure that engenders confidence and trust - providing the maximum climate, reliability and affordability benefits to customers.

For these reasons, the coalition supports AB 825 and urges an “AYE” vote.

Sincerely,

Daniel Chandler
350 Humboldt

Will Brieger
350 Sacramento

Edson Perez
Advanced Energy United (AEU)

Shannon Kellogg
Amazon

Alexander L. Jackson
American Clean Power – California (ACP)

Jim Shetler
Balancing Authority of Northern California (BANC)

Jon Kendrick
California Chamber of Commerce (CalChamber)

Cathy DeFalco
California Choice Energy Authority (CalChoice)

Meredith Alexander
California Coalition of Large Energy Users (CLEU)

Beth Vaughn
California Community Choice Association (CalCCA)

Melissa Romero
California Environmental Voters

Sam Harper
California Large Energy Consumers Association
(CLECA)

Sarah Bridges
California Manufacturers & Technology Association
(CMTA)

Derek Dolfie
California Municipal Utilities Association (CMUA)

Neal Lauzon
California & Nevada State Association of Electrical
Workers (IBEW)

Das Williams
Central Coast Community Energy

Kelly Trombley
Ceres

Greg Wade
Clean Energy Alliance

Nidhi Thakar
Clean Energy Buyers Association (CEBA)

Gina Goodhill
Clean Power Alliance

Adam Sweeney
Climate Action California

RL Miller
Climate Hawks Vote

Glen Garfunkel
Climate Reality - Silicon Valley Chapter

Hunter Stern
Coalition of California Utility Employees (CCUE)

Khara Boender
Data Center Coalition

Susan Nedell
E2

Rachel McMahon
EDF Power Solutions

Scott Farris
EDP Renewables

Cathy Cockrum Dean
Elevate California

Katelyn Roedner-Sutter
Environmental Defense Fund (EDF)

Dylan Sullivan
Google

Jan Smutny-Jones
Independent Energy Producers Association (IEPA)

Collin Smith
Leap

Paul Habib
Los Angeles Department of Water and Power
(LADWP)

Stephanie Chen
MCE

Jonathan Noble
Microsoft

Victoria Rome
Natural Resources Defense Council (NRDC)

Jane Cirrincione
Northern California Power Agency (NCPA)

Steven Halligan
Orange County Power Authority

Melissa Cosio
Pacific Gas and Electric (PG&E)

Michael Wilding
Pacific Power

Varner Seaman
Pattern Energy

Mike Mielke
Peninsula Clean Energy

Sam King
Pioneer Community Energy

Pam Sporborg
Portland General Electric (PGE)

Kelsey Johnson
Rivian

Paul Lau
Sacramento Municipal Utility District (SMUD)

Patrick Welch
San Diego Community Power

Joseph Zanze
San Diego Gas and Electric (SDG&E)

Jakob Evans
Sierra Club California

Monica V. Padilla
Silicon Valley Clean Energy (SVCE)

Ahmad Thomas
Silicon Valley Leadership Group (SVLG)

Stephanie Doyle
Solar Energy Industries Association (SEIA)

Brady J. Van Engelen
Southern California Edison (SCE)

Jose Torres
TechNet

SUPPORT: AB 825 - (Petrie-Norris; Rivas; Becker) as amended, September 10, 2025

Liz Forsburg Pardi
The Nature Conservancy

Daniel Barad
Union of Concerned Scientists (UCS)

Kathleen Staks
Western Freedom

Scott Miller
Western Power Trading Forum (WPTF)

Vijay Satyal
Western Resource Advocates (WRA)

cc: The Honorable Members of the State Senate
The Honorable Members of the State Assembly
Grant Mack, Deputy Legislative Secretary, Office of Governor Gavin Newsom



September 11, 2025

The Honorable Cottie Petrie-Norris
California State Assembly
State Capitol
Sacramento, CA 95814

RE: SB 254 (Becker and Petrie-Norris) – SUPPORT WITH COMMENTS

Dear Chair Petrie-Norris:

On behalf of Peninsula Clean Energy (PCE), a community choice aggregator (CCA) serving approximately 800,000 Californians in San Mateo County and the City of Los Banos in Merced County, we are writing to express our support for SB 254, as amended on September 10, 2025.

SB 254 represents a critical step forward in addressing California's clean energy, affordability, and wildfire challenges. PCE supports your leadership in advancing affordable, reliable, and clean electricity for Californians by creating new financing pathways and accelerating the delivery of transmission infrastructure essential for meeting the state's climate and clean energy goals. The bill also makes important progress in wildfire mitigation.

The bill accelerates transmission buildout needed to achieve the state's 100 percent clean energy and electrification targets. It reduces the cost of capital for large-scale transmission projects, and it also introduces new public-interest financing alternatives. By shifting more financing toward public or blended models, the bill helps reduce long-term ratepayer burdens while supporting both affordability and reliability by funding projects that enhance deliverability of renewables and spread costs more equitably. The bill also extends the Wildfire Mitigation Plan cycle, and ensures OEIS has clear authority to review and approve revisions. These provisions can help direct resources more strategically and reduce unnecessary cost burdens while keeping communities safer.

Implementation Concerns

While PCE supports SB 254, we urge attention to the following issues in terms of administrative implementation to ensure the bill's intent goals for affordability and equity are fully realized:

1. Promote Inclusive and Transparent Governance and Balanced Decision-Making: The new GO-Biz Transmission Infrastructure Accelerator will select 'accelerator projects,' but the statute does not guarantee that project decisions will reflect the diversity of California's energy landscape or the needs of all ratepayers. To address this, we believe CPUC / CEC / GO-Biz should:
 - Create a formal advisory council or stakeholder committee with designated LSE seats.

- Require project criteria and selection decisions be subject to public notice and comment.
 - Ensure that the resource portfolios of all LSEs, including CCAs, are explicitly considered in accelerator project evaluations.
2. Ensure Non-Wires Alternatives (NWA) Are Considered: The Accelerator may default to large 'steel-in-the-ground' projects, even where DERs, DSM, or DR could meet needs more cost-effectively. To address this, we believe state agencies should:
- Require every candidate transmission project to undergo a least-cost, best-fit screening that includes NWAs.
 - Mandate publication of NWA assessment results before financing approval.
 - Harmonize NWA assessments with the IRP and DRP processes.
3. Prevent Double Recovery on Tax-Credited Costs: SB 254 creates a 20% transmission expenditure tax credit through 2035. Without strong enforcement, utilities could attempt to recover ROE or rate base returns on those same costs. To prevent this we suggest that:
- CPUC should adopt regulatory accounting rules that bar any project portion receiving the tax credit from also being included in the rate base.
 - Utilities must report annually on tax credits claimed and corresponding cost exclusions.
 - GO-Biz and the I-Bank should coordinate with CPUC to verify compliance before reimbursement or financing.

We appreciate your leadership on this important legislation. With thoughtful implementation, SB 254 can accelerate clean energy delivery, and help mitigate catastrophic wildfires while protecting California's ratepayers. We look forward to working with you, your staff, and state agencies to ensure these goals are met.

If you have any questions, please contact Mike Mielke with our Policy and Government Affairs team. Mike can be reached at mmielke@pensisulacleanenergy.com; 202-607-1064.

Sincerely,



Marc Hershman
Director of Government Affairs

cc: The Honorable Josh Becker
The Honorable Robert Rivas
The Honorable Mike McGuire

RE: REQUEST for SIGNATURE on AB 825 (Petrie-Norris; Rivas; Becker)

September 16, 2025



September 16, 2025

The Honorable Gavin Newsom
Governor of California
1021 O Street, Suite 9000
Sacramento, CA 95814

RE: REQUEST for SIGNATURE on AB 825 (Petrie-Norris; Rivas; Becker)

Dear Governor Newsom,

The undersigned entities represent an unprecedented coalition of labor, business, climate advocates, clean energy advocates, public and private utilities, community choice aggregators (CCAs) and consumer advocates from across the state. We respectfully request your signature on AB 825, "The Pathways Bill" to bring the West together in the need for clean, affordable, and reliable electricity.

AB 825 builds on the recommendations of the West-Wide Governance Pathways Initiative ("Pathways Proposal") by authorizing participation in a new independent Regional Organization. This voluntary Regional Organization would be responsible for establishing energy market rules that benefit the customers of participating entities across the West. California's participation is voluntary, and California would keep full control over its energy policies, including climate laws, procurement, transmission, planning, and resource adequacy.

As policymakers across the country grapple with how to address skyrocketing energy costs, climate-driven reliability threats, and surging electricity demand, California is presented with the unique opportunity to bring the western interconnection together through the implementation of AB 825.

Implementation of this bill will lower energy costs for consumers, reduce the risk of power outages, and enable more clean energy resources to be built in California and across the region.

Lowering Costs for the West

The success of the Western Energy Imbalance Market (WEIM) is a clear example of the benefits of broad regional energy market participation - serving 80% of the West, it has delivered over \$7 billion in savings (\$3B to CA) since 2014.¹ AB 825 will build upon this success to advance western energy market cooperation and create a structure that engenders confidence and trust - providing the maximum climate, reliability and affordability benefits to customers. Through market expansion, AB 825 lowers California energy costs for consumers and businesses by more than \$1 Billion *annually*.

Keeping the Lights On

With power outages an ever present-threat, AB 825 would enhance the reliability of the regional power grid by enabling more efficient and coordinated management of energy supply and demand across the Western region. With better access to shared resources, grid operators will be better equipped to draw on a wider resource pool during peak demand periods, reduce the likelihood of blackouts, and support the resilience of the grid in the face of growing challenges such as extreme weather events and climate-driven disruptions.²

A Cleaner Future

A consolidated western energy market will maximize use of existing clean energy generation and enable a faster, more affordable clean energy future. AB 825 makes more clean energy available both in California and around the West by reducing curtailment (deliberately reducing output below what could have been produced), a growing problem for solar and wind power generators in California. With 80% of energy customers in the West now served by utilities with net-zero carbon energy mandates, the demand for clean energy resources will continue to grow.

A Golden State Opportunity

On behalf of Californians, we appreciate your commitment to the state's energy goals and dedication to making energy more affordable and reliable. For all of the above reasons, we respectfully request your signature.

Sincerely,

Will Brieger
Legislation & Policy Team Chair
350 Sacramento

Edson Perez
Senior Principal
Advanced Energy United (AEU)

Shannon Kellogg
VP, AWS Americas Public Policy, Amazon
Amazon

Alexander L. Jackson
Executive Director
American Clean Power – California (ACP)

¹ <https://www.westerneim.com/Pages/About/QuarterlyBenefits.aspx>

² Marelai Ahumada-Paras, Michael Mastrandrea, and Michael Wara, Stanford Woods Institute for the Environment, "[Grid Regionalization in the West: Reliability Benefits from Increased Cooperation in Electricity Markets and Operations](#)" (August 2024).

Franki Gracey
Senior California Policy Organizer
BlueGreen Alliance

Jon Kendrick
Policy Advocate
California Chamber of Commerce
(CalChamber)

Meredith Alexander
Principal Consultant
California Coalition of Large Energy Users
(CLEU)

Beth Vaughn
Chief Executive Officer
California Community Choice Association
(CalCCA)

Melissa Romero
Policy Advocacy Director
California Environmental Voters

Sam Harper
Consultant
California Large Energy Consumers Association
(CLECA)

Sarah Bridges
Vice President of Government Relations
California Manufacturers & Technology
Association (CMTA)

Derek Dolfie
Director of Energy
California Municipal Utilities Association
(CMUA)

Neal Lauzon
Business Manager & CEO
California & Nevada State Association of
Electrical Workers (IBEW)

Das Williams
Senior Advisor of Policy and Legislative Affairs
Central Coast Community Energy (CCCE)

Kelly Trombley
Sr. Director, State Policy
Ceres

Priya Barua
Senior Director, Market Access
Clean Energy Buyers Association (CEBA)

Gina Goodhill
Senior Director, Government Affairs
Clean Power Alliance

Adam Sweeney
Chapter Chair
Climate Action California

RL Miller
Founder
Climate Hawks Vote

Hunter Stern
Business Representative
Coalition of California Utility Employees (CCUE)

Khara Boender
Senior Manager, State Policy
Data Center Coalition

Rachel McMahon
Director, Legislative & Regulatory Affairs
EDF Power Solutions

Jack Wadleigh
Regulatory Affairs & Market Development,
Western Region
EDP Renewables

Cathy Cockrum Dean
President & Founder
Elevate California

Katelyn Roedner-Sutter
California State Director
Environmental Defense Fund (EDF)

Dylan Sullivan
Energy Market Development
Google

Jan Smutny-Jones
Chief Executive Officer
Independent Energy Producers Association
(IEPA)

Collin Smith
Regulatory Affairs Manager
Leap

Paul Habib
Director of Legislative and Intergovernmental
Affairs
Los Angeles Department of Water and Power
(LADWP)

Stephanie Chen
Vice President of Legislative Affairs
MCE

Jonathan Noble
Senior Director, State & Local Government
Affairs
Microsoft

Victoria Rome
California Director, Government Affairs
Natural Resources Defense Council (NRDC)

Jane Cirrincione
Assistant General Manager, Legislative and
Regulatory Affairs
Northern California Power Agency (NCPA)

Melissa Cosio
Government Relations
Pacific Gas and Electric (PG&E)

Marc Hershman
Director of Government Affairs
Peninsula Clean Energy

Pam Sporborg
Portland General Electric (PGE)
Director of Transmission and Market Services

Paul Lau
CEO and General Manager
Sacramento Municipal Utility District (SMUD)

Patrick Welch
Associate Director of Legislative Affairs
San Diego Community Power

Eugene "Mitch" Mitchell
Sr. Vice President & Chief Legislative Officer
San Diego Gas and Electric (SDG&E)

Monica V. Padilla
Chief Executive Officer
Silicon Valley Clean Energy (SVCE)

Stephanie Doyle
Director, State Affairs, California
Solar Energy Industries Association (SEIA)

Brady J. Van Engelen
Senior Advisor, Government Relations
Southern California Edison (SCE)

Jose Torres
Deputy Executive Director | California & the
Southwest
TechNet

Scott Miller
Executive Director
Western Power Trading Forum (WPTF)

Daniel Barad
Co-Director, Western States
Union of Concerned Scientists (UCS)

Vijay Satyal
Deputy Director, Regional Markets
Western Resource Advocates (WRA)

Kathleen Staks
Executive Director
Western Freedom

CC:

The Honorable Assemblymember Cottie Petrie-Norris;
The Honorable Assembly Speaker Robert Rivas;
The Honorable Senator Josh Becker

Status of 2025 Legislative Session Bills
As of September 16, 2025
With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
AB 259 (B. Rubio) Brown Act Exemption: Remote Participation	This bill would extend the January 1, 2026, sunset to January 1, 2030, that allows members of a local legislative body to appear remotely, under certain circumstances, without having to provide their location and other requirements of the Brown Act.	2-year bill.			The proposed policy of this bill was codified in SB 707 (Durazo)
AB 303 (Addis) Battery Energy Storage Facilities	Existing law, until June 30, 2029, authorizes a person proposing an eligible facility, including an energy storage system capable of storing 200 megawatt hours or more of energy, to submit an application for certification with the State Energy Resources Conservation and Development Commission of the site and related facility. Existing law specifies that the issuance by the commission of the certificate is in lieu of any permit, certificate, or similar document required by any state, local, or regional agency, or federal agency to the extent permitted by federal law, except as provided. Existing law establishes the procedures by which the commission is to review the application. This bill would specify that energy storage systems do not include battery energy storage systems for the above-described purposes. This bill contains other related provisions and other existing laws.	2-year bill.		Oppose	

Status of 2025 Legislative Session Bills

As of September 16, 2025

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
AB 306 (Schultz) Building Regulations: state building standards	Existing law requires the Building Standards Commission to approve and adopt building standards and to codify those standards in the California Building Standards Code (code). Existing law authorizes any city or county to make changes in those building standards that are published in the code, including to green building standards. Existing law requires the governing body of a city or county, before making modifications or changes to those green building standards, to make an express finding that those modifications or changes are reasonably necessary because of local climatic, geological, or topographical conditions. This bill would, from October 1, 2025, to June 1, 2031, inclusive, prohibit a city or county from making changes that are applicable to residential units to the above-described building standards unless a certain condition is met, including that the commission deems those changes or modifications necessary as emergency standards to protect health and safety.	2-year bill	Oppose Unless Amended	Oppose Unless Amended	The proposed policy was codified in AB 130, a budget trailer bill.
AB 526 (Papan) Geothermal Energy Generation	This bill would require the Energy Commission, in coordination with the PUC, Air Resources Board, and other state agencies, to develop a strategic plan for the development of new in-state geothermal energy. The bill would also	This bill was held on the Assembly Appropriations Suspense File and is now dead.	Support	Support	This bill is sponsored by Sonoma Clean Power.

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	require the Energy Commission, on or before June 1, 2026, to evaluate and quantify the maximum feasible capacity of new in-state geothermal energy to achieve reliability, ratepayer, employment, and decarbonization benefits, and to establish megawatt in-state next-generation geothermal planning goals for 2035 and 2045				
AB 527 (Papan) CEQA: Geothermal Exploratory Projects	This bill proposes to create a categorical exemption from CEQA for geothermal exploratory wells.	Awaiting Governor signature or veto. Passed Legislature		Support	This bill is sponsored by Sonoma Clean Power.
AB 531 (Rogers) Environmental Leadership Development Projects: Geothermal	This bill would expand the types of facilities eligible to be certified as environmental leadership development projects by the Energy Commission, which enjoy CEQA streamlining benefits, to include geothermal powerplants and geothermal field development projects	Awaiting Governor signature or veto. Passed Legislature		Support	This bill is sponsored by Sonoma Clean Power and co-authored by Asm. Papan
AB 706 (Aguiar-Curry) BioMAT	The renewable feed-in tariff law, in part, requires the PUC to direct the electrical corporations, collectively, to procure at least 250 megawatts of cumulative rated generating capacity from developers of bioenergy projects that commence operation on or after June 1, 2013. Pursuant to this requirement, the PUC has	2-year bill.		Support	This bill seeks to create a funding source that can reduce the cost of BioMAT and and BioRAM.

Status of 2025 Legislative Session Bills

As of September 16, 2025

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	established and revised the Bioenergy Market Adjusting Tariff (BioMAT) program. On March 18, 2016, the PUC issued Resolution E-4770 to order investor-owned utilities to each hold a solicitation for contract with facilities that can use biofuel from high hazard zones to address an Emergency Proclamation using the Bioenergy Renewable Auction Mechanism (BioRAM) program. This bill would establish the fire fuel reduction program to support sufficient procurement, transport, and beneficial use of forest biomass waste to reduce fuel for wildfires by up to 15,000,000 bone-dry tons of forest biomass waste per year. The bill would establish the FOREST and Wildfire Prevention Fund in the State Treasury, and would continuously appropriate the fund to the Natural Resources Agency for this program, as specified. The bill would require the fire fuel reduction program to grant funding priority to BioRAM and BioMAT fleets in operation on or before January 1, 2031.				The author successfully ran legislation in 2021 (AB 846) to make CCAs eligible under BioMAT.
AB 729 (Zbur) IOUs: Climate Credits	The California Global Warming Solutions Act of 2006 designates the State Air Resources Board as the state agency charged with monitoring and regulating sources of emissions of greenhouse gases. The act authorizes the state board to include the use of market-based	2-year bill		Support	

Status of 2025 Legislative Session Bills

As of September 16, 2025

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	compliance mechanisms in regulating those emissions. The implementing regulations adopted by the state board provide for the direct allocation of greenhouse gas allowances to electrical corporations and gas corporations pursuant to a market-based compliance mechanism. This bill would require that the electric California Climate Credit be provided to residential, small business, and emissions-intensive trade-exposed retail customers of electrical corporations on the bills of those customers for the months of August and September of each year unless otherwise directed by the commission, as specified.				
AB 740 (Harabedian) Virtual Power Plants	Existing law requires the CEC, in consultation with specified entities, to adopt a biennial integrated energy policy report containing certain information, including an overview of major energy trends and issues facing the state. This bill would require the CEC, on or before November 1, 2026, to adopt a virtual power plant deployment plan. The bill would require the Energy Commission, in developing the plan, to take certain actions, and would require that the plan meet specified requirements. The bill would require the plan adopted pursuant to	Awaiting Governor signature or veto. Passed Legislature		Support	

Status of 2025 Legislative Session Bills

As of September 16, 2025

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	these provisions to be included in the above-described integrated energy policy report.				
AB 825 (Petrie-Norris) CAISO: Independent Regional Organization	Existing law provides for the establishment of an Independent System Operator (ISO) as a nonprofit public benefit corporation and requires the ISO to ensure efficient use and reliable operation of the electrical transmission grid consistent with achieving planning and operating reserve criteria no less stringent than those established by the Western Electricity Coordinating Council and the North American Electric Reliability Council. Existing law, the Clean Energy and Pollution Reduction Act of 2015, provides for the transformation of the ISO into a regional organization, with the approval of the Legislature, pursuant to a specified process. That process provides that modifications to the ISO's governance structure, through changes to its bylaws or other corporate governance documents, will not become effective until the ISO, the Public Utilities Commission (PUC), the State Energy Resources Conservation and Development Commission (Energy Commission), the State Air Resources Board (state board), the Governor, and the Legislature take specified actions on or before January 1, 2019. This bill would delete	Awaiting Governor signature or veto. Passed Legislature	Support	Support	AB 825 was amended on September 10 to incorporate the policy proposal formed by the Pathways Initiative. AB 825 subsumed SB 540 as the bill to allow CAISO to participate in a new regional organization to manage EDAM and WEIM

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	the above-described provisions providing for the transformation of the ISO into a regional organization. The bill would authorize the ISO and the electrical corporations that are participating transmission owners whose transmission systems are operated by the ISO to use voluntary energy markets governed by an independent regional organization, only if specified requirements are satisfied. The bill would authorize the ISO, on or after January 1, 2028, to implement tariff modifications accepted by the Federal Energy Regulatory Commission to operate the energy markets whose rules are governed by an independent regional organization if the governing board of the ISO has adopted a resolution, as specified, finding that each of the specified requirements have been, or will be, adopted by the independent regional organization. The bill would require the PUC to make a determination through a formal decision in an existing or new proceeding that these requirements have been satisfied before electrical corporations participate in an energy market governed by an independent regional organization. The bill would require the ISO to maintain the necessary technical capability to operate energy markets,				

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	as specified, and would require the ISO to continue its functions and responsibilities as a balancing authority, as provided.				
AB 941 (Zbur) CEQA: Electrical Infrastructure Projects.	This bill would require the PUC to determine whether to certify the environmental impact report for an electrical infrastructure project that is a priority project, as defined, no later than 270 days after the commission determines that an application for an electrical infrastructure project is complete.	This bill was held on the Assembly Appropriations Suspense File and is now dead.		Support	
SB 57 (Padilla) Data Centers: Special Rates	Existing law vests the Public Utilities Commission with regulatory authority over public utilities, including electrical corporations. Existing law authorizes the commission to fix the rates and charges for every public utility and requires that those rates and charges be just and reasonable. This bill would authorize the commission to assess the extent to which electrical corporation costs associated with new loads from data centers result in cost shifts to other electrical corporation customers, as provided. The bill would require the commission to submit an assessment completed pursuant to that authorization to the relevant policy committees of the Legislature and to publicly post a copy of the assessment on the	Awaiting Governor signature or veto. Passed Legislature			The final amendments to this bill changed it to a CPUC study of cost-shifts attributed to data centers, but that study is optional.

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	commission's internet website on or before January 1, 2027.				
SB 239 (Arreguín) Brown Act Exemption: Subsidiary Bodies	This bill would authorize a subsidiary body, defined as one that serves exclusively in an advisory capacity and has no final decision-making authority, to use similar alternative teleconferencing provisions and would impose requirements for notice, agenda, and public participation, as prescribed. To use teleconferencing pursuant to this act, the bill would require the legislative body that established the subsidiary body by charter, ordinance, resolution, or other formal action to make specific findings by 2/3 vote before the subsidiary body uses teleconferencing for the first time and every 12 months thereafter.	The author placed this bill on the Inactive File			The proposed policy of this bill was codified in SB 707 (Durazo)
SB 254 (Becker) FERA Customers	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. The act generally requires for teleconferencing that the legislative body of a local agency that elects to use teleconferencing post agendas at all teleconference locations, identify each teleconference location in the notice and agenda of the meeting or proceeding, and have each teleconference location be accessible to the public. Existing law also requires that, during the teleconference, at least a quorum of the members of the legislative body participate from locations within the boundaries of	Awaiting Governor signature or veto. Passed Legislature		Support	This bill subsumed many of the policy proposals originally considered in AB 825. The main components of this bill focus on recapitalizing the IOU insurance

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	the territory over which the local agency exercises jurisdiction, except as specified. Existing law, until January 1, 2026, authorizes specified neighborhood city councils to use alternate teleconferencing provisions related to notice, agenda, and public participation, as prescribed, if, among other requirements, the city council has adopted an authorizing resolution and 2/3 of the neighborhood city council votes to use alternate teleconference provisions, as specified This bill would authorize a subsidiary body, as defined, to use alternative teleconferencing provisions and would impose requirements for notice, agenda, and public participation, as prescribed. The bill would require the subsidiary body to post the agenda at each physical meeting location designated by the subsidiary body, as specified. The bill would require the members of the subsidiary body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform, as specified. The bill would also require the subsidiary body to list a member of the subsidiary body who participates in a teleconference meeting from a remote location in the minutes of the meeting. This bill contains other related provisions and other existing laws.				pool known as the Wildfire Fund. Importantly, this bill did not contain the Demand Side Management Council previously contained in AB 825, a provision that PCE opposed.
SB 282 (Wiener) Residential Heat Pump Systems: Water Heaters and HVAC: Permit Streamlining	This bill would require the commission, on or before January 1, 2027, to establish a statewide certification program for licensed contractors of residential heat pump water heaters and heat pump HVAC systems to obtain a heat pump installation certification. The bill would authorize a licensed contractor with a heat pump system installation certification described	This bill was held on the Assembly Appropriations Suspense File and is now dead.			This bill is co-sponsored by SPUR, Bay Area Air District, and Building Decarb Coalition

**Status of 2025 Legislative Session Bills
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With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	above to self-certify that the installation of a residential heat pump water heater or heat pump HVAC system meets all relevant code requirements without any requirement that an inspector be present for the installation, and would require a city, including a charter city, county, or city and county to accept the certification for those purposes, as specified.				
SB 283 (Laird) Battery Energy Storage Facilities: Emergency Response Plans and Emergency Action Plans	Existing law requires the State Fire Marshal, before the next triennial edition of the California Building Standards Code adopted after January 1, 2025, to propose to the Building Standards Commission (commission) updates to the fire standards relating to requirements for lithium-based battery systems, as provided. This bill would require the commission and the Office of the State Fire Marshal to review and consider the most recently published edition of the National Fire Protection Association (NFPA) 855, Standard for the Installation of Stationary Energy Storage Systems, for incorporation into the next update of the California Building Standards Code adopted after July 1, 2026. This bill contains other related provisions and other existing laws.	Awaiting Governor signature or veto. Passed Legislature		Support if Amended	
SB 302 (Padilla)	This bill would align California's tax code with provisions in the Inflation Reduction Act that	Awaiting Governor signature or veto.		Support	

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With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
County Sealers: EV Chargers	expand financing options for clean energy developers. In other states, developers may exclude, when reporting their gross income, earnings from the sale of clean energy tax credits, which accrue under the law once projects are up and running.	Passed Legislature			
SB 314 (Padilla) Electric Vehicle Supply Equipment: Weights & Measures	This bill would authorize an EVSE that has been audited or tested by the manufacturer or supplier to be used commercially without further testing during the remainder of the inspection period adopted by the Secretary of Food and Agriculture, but not until it has been sealed by a sealer. The bill would, until January 1, 2028, among other things, exempt an EVSE installed in a workplace for the exclusive use of its employees, or installed in a residence, including a multifamily residential dwelling, for the exclusive use of the residents, from specified laws, and would authorize an EVSE, following installation, to be used in connection with the sale of electricity as a motor vehicle fuel without being placed into service by a service agency or sealer, a specified.	This bill was held on the Assembly Appropriations Suspense File and is now dead.			
SB 330 (Padilla)	Enables the Governor to establish one or more pilot projects to develop, finance, or operate electrical transmission infrastructure that meet certain criteria, including: being identified by	2-year bill		Support	The main thrust of this bill was codified in SB 254 (Becker)

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As of September 16, 2025**

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Bill	Summary	Status	PCE Position	CalCCA Position	Comments
Transmission Infrastructure Financing	the ISO in its transmission planning process, provides a significant reduction in cost, and is implemented under a PLA. Authorizes the Governor to designate existing state agencies, local public agencies, tribal organizations, or joint powers authorities to implement the pilot projects				
SB 332 (Wahab) PUC Commissioners	This bill would require the Energy Commission to select a research institute, as defined, to conduct a comparative analysis of the benefits and challenges of transitioning the electrical corporations to a public entity, nonprofit public benefit corporation, or mutual benefit corporation in order to identify a recommended model, as provided. The bill would require the research institute to complete the analysis on or before January 1, 2029, and, upon completion, to submit the analysis to the Legislature and the Energy Commission. The bill would require the Energy Commission to make a draft of the analysis available to the public for comment before submitting the final draft to the Legislature.	Held on the Assembly Appropriations Suspense File and is now dead.			
SB 540 (Becker) Western Regional Organization	This bill attempts to codify the West-Wide Pathways recommendation to authorize CAISO to relinquish its singular control of the Western Energy Imbalance Market (EIM) and Western	2-year bill	Support	Support	The main provisions of this bill were codified

**Status of 2025 Legislative Session Bills
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Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	Enhanced Day Ahead Market (EDAM) so that those two markets could be governed by an independent western regional organization. The bill would establish the Regional Energy Market Oversight Council, which would be responsible for ensuring that participation in regional energy markets serves the interests of the state. The bill would require the council to approve or disapprove initial participation in the independent regional organization by electrical corporations and any other participating load-serving entities and determine whether electrical corporations and any other participating load-serving entities should be required to withdraw from an energy market governed by the independent regional organization. The bill would require the council to convene a duly noticed public meeting to make a finding of approval or withdrawal of participation in the independent regional organization and would require the council to disapprove of initial participation in the independent regional organization, or order withdrawal, if the council makes any of specified findings.				in AB 825 (Petrie-Norris)
SB 541 (Becker)	Existing law requires the Energy Commission, in consultation with the Public Utilities	Awaiting Governor signature or veto.		Oppose	While the bill underwent some

**Status of 2025 Legislative Session Bills
As of September 16, 2025**

With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
Load Shifting: Dynamic Pricing	Commission (PUC) and the Independent System Operator, to adopt a goal for load shifting to reduce net peak electrical demand and adjust this target in each biennial integrated energy policy report thereafter. This bill would require the Energy Commission, as part of each integrated energy policy report, to allocate the load shifting needed to reach the above-described load-shifting goal, including biennial adjustments to the goal, to each retail supplier, based on the commission's estimate of its load-shifting potential, including consideration of the relative share of statewide load of each retail supplier. The bill would require the Energy Commission, on or before July 1, 2028, and biennially thereafter, to evaluate and publish the amount of load shifting that each retail supplier achieved in the prior calendar year, and the amount of load shifting that each retail supplier is expected to achieve in future years, in comparison to the load shifting allocated to the retail supplier, as specified.	Passed Legislature			helpful amendments, remains concerned with provisions that require the CEC to include in the next IEPR an analysis of load-shift potential for each retail seller.
SB 707 (Durazo) Open Meetings: Brown Act Requirements	This bill is an omnibus proposal for exemptions to the Brown Act for local public meetings including extending until 1/1/30 the AB 2449 sunset, authorizing virtual meetings for subsidiary bodies, neighborhood councils, and	Awaiting Governor signature or veto. Passed Legislature			

Status of 2025 Legislative Session Bills
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With Peninsula Clean Energy and CalCCA Adopted Positions

Bill	Summary	Status	PCE Position	CalCCA Position	Comments
	multijurisdictional bodies. For multijurisdictional bodies, an in-person quorum must be established, each remote attending member must be identified in the agenda, a member receiving compensation must participate from a physical location accessible to the public, the remote participating members must be at least 20 miles round trip from the in-person meeting location.				
SB 842 (Stern) Firm Zero-Carbon Resources	This bill would require the PUC, on or before December 31, 2026, to produce a report identifying opportunities and needs to provide for local reliability with firm zero-carbon resources over the short term, midterm, and long term, as provided. The bill would require the report to include, among other things, characterization of the resource attributes vital for local reliability and identification of barriers, including market barriers, to deploying firm zero-carbon resources to enhance local reliability.	Referred to the Assembly Committee on Appropriations		Position Under Consideration	



**PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence**

DATE: August 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Executive Committee

FROM: Jayden Hanan, Account Services Specialist Leslie Brown, Director of Account Services

SUBJECT: Discussion on Peninsula Clean Energy AI Chatbot: A New Tool for Customers (Discussion)

RECOMMENDATION

No action necessary. This report provides information on a forthcoming customer service offering, an AI chatbot.

BACKGROUND

As part of Peninsula Clean Energy's focus on excellent customer service, PCE has been working on new ways for customers to receive rapid responses to their questions. One of the tools we will soon launch is a web-based AI chatbot through our HappyFox platform, which we use to manage our email conversations with customers. Through HappyFox, we are able to keep a record of all interactions we have with each customer to provide context for future interactions. The chatbot supplements our call center customer service offerings by providing access to information after business hours, including nights, weekends and holidays. The addition of a chatbot on PCE's website also allows customers to access information without the time-investment of an email or phone call if that is preferred.

DISCUSSION

Overview

PCE's chatbot enables customers to receive nearly instant answers to their questions via AI technology. Customers may ask an unlimited number of questions to the chatbot and can do so anonymously without providing their email or phone number. Each chatbot response contains PCE's phone and email contact information, should the customer wish to speak to a staff member during business hours instead. After hours, customers will have the option to generate a service ticket in HappyFox to receive an email response or return call from one of our call center advisors (CSAs). When a customer generates a ticket in this way, our CSAs will be able to view the entirety of their conversation with the chatbot, providing important context for their subsequent conversation with the customer.

For security reasons, the AI chatbot will not have access to customer data, so it will be limited to answering general questions only. The AI chatbot is limited to pulling information from the PCE website and any other informational documents we choose to provide to it for learning. It does not learn from customer interactions, and may occasionally search the broader web for questions that are not answered by the information we provide to it. For account-specific information such as a rebate status or net energy metering (NEM) credit balance, customers will still need to contact one of our live CSAs.

The chatbot is equipped to handle questions in any language via Google translation services. This will help us better address the needs of customers who speak languages other than English and Spanish.

We are currently in an internal testing period and anticipate launching the chatbot in Q4 2025.

Next Steps

Following the website chatbot's launch, PCE plans to also launch a "live-chat" service option for customers. Similar to the chatbot, the HappyFox-hosted live chat option will be located on the PCE website but will allow customers to receive account-specific information if they choose to provide their account details. Any account-specific information shared will not be given to the AI Chatbot, and the AI chatbot will not be learning from any customer interactions whatsoever, only specific content we feed to it. The live chat feature will have set operating hours during PCE's typical business hours. The HappyFox software will allow our CSA team to see customers' questions as they're typing them, as well as any previous interactions our team has had with the customer via email, live chat, or chatbot. This form of modern communication augments customers' access to our CSA's via phone or email and is preferred by some customer segments. The live chat feature will launch in Q1 2026.

Implementing a chatbot on our website will allow PCE to continue to deliver on our commitment to customer-centricity. Coupled with our forthcoming live chat feature, the chatbot will allow PCE's support team to better meet customers where they are and increase accessibility overall. This will enable customers to receive answers to their questions at any time on any day of the week, no longer limited by our business hours. Due to the repetitive nature of many of the questions our customer support team infields, we believe the chatbot will serve as a great tool for our customers as we have trained and curated its knowledge using our most frequently asked questions and information from our website. Going forward, we predict this feature will lower the call volume for basic questions, as customers can find answers quickly via the chatbot.

FISCAL IMPACT

Expands available time of CSAs to respond to more complex customer questions and take on expanded customer advisory services without having to hire additional staff members.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: Majority Vote

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Blake Herrschaft, Senior Programs Engineer
SUBJECT: Update on 2025 Reach Codes (Discussion)

BACKGROUND

Reach codes are amendments to the CA State building code adopted by local jurisdictions to advance sustainability goals. Along with PCE consultant, TRC, Peninsula Clean Energy has provided technical assistance to member agencies wishing to adopt reach codes since 2019. This has resulted in substantial greenhouse gas emission reductions, and has saved customers money during construction, and on their energy bills.

Beneficial impacts of the program include:

- 21 member agencies have adopted reach codes since 2019
- Over 2,000 buildings have been built as all-electric and/or with additional EV charging access
- Building owners and customers have avoided over \$80 million in construction costs
- By building to low-carbon standards in the first place, over \$31 million of potential PCE incentive costs have been saved.

As the updated 2025 California State Building Code is adopted this Fall, new model ordinances have been developed for consideration and use by PCE member agencies.

DISCUSSION

Inspired by many of PCE's leading local agencies, California's 2025 statewide building code is a significant advance for cleaner, affordable construction. For many building types, no reach codes for new construction will be needed.

New State code includes:

- EV charging in multifamily buildings providing charging access to every residence
- Single-family and most commercial buildings are likely to build all-electric to code
- The state code has started to require electrification when some gas equipment is replaced in commercial buildings, but only for very specific cases in very specific

buildings.

Where gaps remain, local reach codes can fill in:

- The 2025 building code does not address decarbonization of existing single-family homes, which represent 50% of building emissions in PCE's service territory
- Multi-family water heating will still benefit from local ordinances, especially where large multi-family projects are planned
- Additional standards for existing commercial will be needed to meet local climate goals

Benefits of electric appliances

Electric equipment improves indoor air quality, especially electric cooking equipment. Gas stoves have been linked to 12.7% of cases of childhood asthma in the US.

All-electric homes are less expensive to build than mixed-fuel homes due to the reduction in materials and system costs associated with gas piping. For existing buildings, there are specific opportunities for cost neutral electrification policies during renovations, remodels, and equipment replacement. The model codes outlined below focus on those opportunities.

Heat pump space and water heating systems are at least four times as efficient as the equivalent methane gas system. For this reason, all-electric homes typically reduce customers home energy bills, especially if the customer selects an electrification-friendly electric rate. Analysis by Silicon Valley Clean Energy has shown average bill savings to be “roughly \$32 per month.” Peninsula Clean Energy's whole-home electrification pilot at low-income homes confirmed savings in six (6) real-world homes.

From a greenhouse gas emissions perspective, electrifying new and existing buildings will need to happen at significant scale in order to meet local and state emissions reduction targets.

Model ordinances available for continued progress

Model codes are available at www.bayareareachcodes.com. Cost-effective policy options include:

Available now for existing single-family homes:

- AC to heat pump – incentivizes installing heat pumps when installing air conditioners
- “Flexpath” – flexibly encourages decarbonization during renovations
- Pre-wiring – requires common sense electrical pre-wiring during home improvement projects
- Commercial AC to heat pump – incentivizes heat pumps when replacing certain AC systems

Local agencies are encouraged to review these codes now for consideration and possible adoption before the end of the year, which would align with the incoming State code in January 2026. Multi-family new construction model code will be released in Q1 2026.

Ordinance Considerations for 2026-2031

1. Gas water heater to heat pump water heater (HPWH). In preparation for the 2027 Air District rules requiring electrification at replacement for most water heaters, some cities are considering adopting a similar requirement ahead of time. Other cities have requested a

standard to be developed in case the 2027 implementation date for the Air District is pushed back.

2. Building benchmarking standards, which measure building energy use, and require owners to improve energy efficiency at specific trigger points over time. Berkeley recently passed an ordinance on this topic, which PCE staff is tracking closely.

Navigating AB 130 (formerly AB 306)

On June 30, 2025, AB 130 was signed into law. In an effort to increase housing production, the assembly bill limits changes to residential building code requirements from October 1, 2025 - January 1, 2031. However, the bill offers multiple strategies that jurisdictions can use to move forward on building codes:

1. Commercial buildings – only residential construction is impacted by AB 130
2. For all types of buildings, most cities can likely still adopt reach codes as planned. An important exception appears to allow jurisdictions with specific General Plan language to adopt residential reach codes at any time. Jurisdictions are encouraged to speak to their legal counsel to determine applicability of that exception.
3. Codes falling outside the building standards process. Some policy actions being taken at other cities would not be governed by the building code updates. Most notably, building benchmarking standards.

FISCAL IMPACT

Funding for PCE's Reach Code work is included in the Board-approved Community Energy Programs budget.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 12, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Gwendolyn Rose, Director of Marketing & Community Relations
SUBJECT: Update on Brand Strategy and Naming Exploration (Discussion)

BACKGROUND

Over the past nine years, Peninsula Clean Energy has built a strong foundation with our customers and communities. Our name and identity have helped establish us as a credible, straightforward, and transparent provider of clean electricity. That clarity was critical in our early years, and it contributed to important milestones: a 97% customer participation rate, more than \$200 million in rate savings and other local economic benefits, and a demonstrable role in decarbonizing the electricity supply.

As we enter our second decade, however, the work before us becomes more complex and more personal. The next chapter of decarbonization is not just about cleaning the supply of electricity—it is about enabling people to make changes in their homes, their buildings, and their modes of transportation. These are big, often costly decisions that touch people's daily lives and sense of security. Meeting this challenge requires deeper awareness and trust, a stronger emotional connection, and a brand that helps people see themselves as partners in the transition.

It was in this context that staff began, in early 2024, to update Peninsula Clean Energy's brand strategy. We conducted a brand audit, tested messages with customers, and clarified our brand essence, architecture, and fit. This work confirmed that while our current brand conveys accuracy and clarity, it does not spark imagination or connection. Our Agency's name, in particular, poses challenges: it is long, geographically limiting, and is often and easily confused with PG&E. These findings led us to launch a structured naming exploration process to evaluate whether a new Agency name could better support our long-term goals.

DISCUSSION

The purpose of this exploration is to carefully assess whether an updated name and identity would strengthen our ability to meet long-term goals. This work has focused on four main needs:

1. Support our mission to help decarbonize homes, buildings, and transportation.

2. Deepen connection with customers, who will increasingly be asked to make big personal changes.
3. Reduce confusion with PG&E, which remains common in the community.
4. Allow for clearer storytelling and imagery that conveys both our role and our aspirations.

To guide this process, we formed a Naming Committee that includes Board members and executive leadership. The Committee has met regularly since March to review progress and help shape the direction of the work.

With the Committee's oversight, we engaged Lexicon Branding to support the process. The work has unfolded in several phases:

- **Discovery:** More than 70 interviews and surveys with staff, Board members, the CAC, and community partners.
- **Creative Framework:** A set of criteria describing what any potential name would need to do.
- **Name Development & Review:** Multiple rounds of options, reviewed and discussed by the Committee and then sent for early screening.
- **Early Screening:** Initial legal, linguistic and trademark checks to determine availability and identify possible concerns.
- **Customer Research:** Testing with key customer groups to understand first impressions and alignment of certain names with values.

We've gone through a structured process, and customer research initially indicates a promising direction. Further due diligence is underway on the finalist name options, including legal, linguistic, and domain reviews.

Next Steps

- Complete legal, linguistic, and domain reviews on the finalist names.
- Prepare materials so the Board has the information needed to weigh options.
- Return in October with a recommendation for Board consideration.

The Naming Committee will continue to guide the final stages of this work. The October Board retreat will give the full Board the opportunity to review the findings in detail and decide whether adopting a new name, and which one, is the right step for Peninsula Clean Energy.

FISCAL IMPACT

A potential name change would require investments across several areas, including updates to digital platforms, revisions to customer-facing materials, and changes to event signage, etc. Additional funding would also be needed to introduce a new name through brand awareness activities, which would in many cases coincide with the Agency's 10 year celebrations in 2026.

The Fiscal Year budget currently includes an estimated \$300,000 for brand and awareness efforts. While this provides a starting point, it will not fully cover the costs of a name change. Because a major awareness campaign was already planned for our 10-year anniversary, many of the necessary activities can be integrated into that effort—helping to reduce

duplication and maximize impact. Even so, additional resources may be required to fully support a successful transition over the remainder of this fiscal year and into next. Staff is currently gathering additional cost information to have a more complete picture of the combined 2026 cost of implementing a new name, 10-year anniversary events and a long-planned brand awareness campaign. Please note that many of these costs will be one-time investments.

STRATEGIC PLAN

Develop a strong brand reputation that drives participation in Peninsula Clean Energy's programs and ensures customer satisfaction and retention.

OBJECTIVES

1. Brand Reputation: Elevate Peninsula Clean Energy's brand reputation as a trusted leader in the community and the industry.
2. Engagement: Educate and engage stakeholders in order to gather input, inspire action, and drive program participation



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: July 22, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Shalini Swaroop, Chief Operating Officer

SUBJECT: 2020-2025 Strategic Plan Review of Accomplishments and Close Out
 (Discussion)

BACKGROUND

Since adopting PCE's ambitious 2020–2025 Strategic Plan in April 2020, the Board and Executive Committee have received annual updates tracking progress against stated goals related to Power Resources, Community Energy Programs, Marketing & Community Relations, Account Services, Public Policy, Finance, Data & Technology, and Organizational Excellence. Over this period, Peninsula Clean Energy pivoted from early implementation to disciplined, portfolio-scale execution, using Board-approved dashboards and work plans to adjust goals and tactics as market, regulatory, and financial conditions evolved.

Three themes anchored Board and Executive Committee discussions. First, on renewable supply, PCE advanced from a broad “24/7 renewable” ambition to a more durable, affordability-first path: maintaining the annual 100% renewable objective while maximizing hourly matching, supported by a rapidly expanded and diversified portfolio. Since 2020, PCE has executed more than 1.4 GW of renewable and storage contracts, including 600 MW of new renewables and 500 MW of storage with over 900 MW already online. Governance and operations matured in parallel. PCE maintained an A+ compliance culture in procurement, strengthened energy risk policies and hedging, expanded scheduling coordinator capabilities, completed implementation of the CPUC Slice-of-Day framework, and enhanced power optimization and compliance tools.

Second, on community decarbonization, the Board adopted an aspirational 2035 decarbonization goal focused on transportation and buildings, followed by a feasibility analysis that defined realistic adoption ranges and program priorities. Staff then stood up and scaled program offerings: expanded building-electrification incentives and high-touch customer support; influential reach codes for new construction and EV charging; right-sized charging standards and targeted multifamily deployment; expanded incentives and advisory services for vehicles and fleets; and new financing mechanisms, including on-bill financing and third-party tools. Early adoption remains modest, but the foundational policy wins, program designs, and programmatic pipelines position PCE to accelerate participation and impact in the next five years of effort.

Third, PCE bolstered enterprise resilience to deliver at scale. The agency diversified counterparties and resources; overhauled the energy risk policy and began work on an enterprise-wide risk policy; launched automated portfolio-optimization and hedging models; and integrated grid-scale batteries. It implemented a cost-of-service ratemaking framework, maintained strong liquidity and enhanced credit standing, and formalized Data & Technology as a standalone function to support analytics, systems governance, cybersecurity, and self-service reporting. Organizationally, PCE built its People & Culture (human resources) capacity, advanced innovation and governance practices, and improved Board materials and onboarding to sustain knowledgeable and transparent oversight.

Upcoming 2026–2030 goals and objectives extend, not reset, the 2020–2025 trajectory by locking in the 2030 annual 100% renewable target with additional long-term procurement while advancing hourly matching; scaling distributed energy resources (DERs) from pilots to deployment via local solar, customer-sited storage, and at least one 10 MW virtual power plant; expanding equity programs using external funding and community based organization partnerships; and bolstering organizational excellence (rate design, risk policy, data/technology) to maintain affordability and reliability.

These initiatives directly leverage the last strategic plan's groundwork: 1.4 GW in executed contracts, a diversified supplier base, more sophisticated scheduling coordinator operations, a new Distributed Energy Resources Management Software (DERMS), impactful reach-code leadership, and right-sizing standards, translating portfolio growth into faster customer adoption, measurable grid-emissions reductions, and durable cost control under the new Strategic Plan which will come before the Board in October for discussion and November for adoption.

DISCUSSION

Below are department-level report outs summarizing major wins, measurable progress against key performance indicators, and work still underway. Each section distills what was presented in Board and Executive Committee packets from 2020–2025, focusing on outcomes, scale, and lessons learned.

Organizational Priorities

100% Renewable Energy on an Annual Basis by 2030

Peninsula Clean Energy remains on track to achieve its goal of delivering 100 percent renewable energy on an annual basis by 2030. Since 2020, the agency has contracted more than 1.4 gigawatts of renewable and storage capacity, including 600 MW of new renewable generation and 500 MW of storage. Of this, over 900 MW is already online, with the remainder under development.

These procurements, representing more than \$1 billion in transactions, demonstrate steady progress toward the 2030 commitment and provides a solid foundation for PCE's leadership in 24/7 hourly matching of renewable supply and load. Together, these achievements show that Peninsula Clean Energy is well positioned to meet its renewable energy goal while maintaining affordability and reliability for customers.

2035 Decarbonization Goal

In September 2021, the Board adopted PCE's aspirational goal of achieving 100 percent decarbonization by 2035, focused on reducing emissions from transportation and buildings. Staff analysis completed in 2022 found the technical potential to electrify 50–60 percent of vehicles and 25–35 percent of single-family and small multifamily homes by 2035, provided there is sustained local investment alongside private, state and federal support.

Since then, PCE has implemented the core recommendations of that plan. Expanded building electrification incentives and high-touch customer support were introduced in 2022 and 2024, while PCE's model reach codes were adopted into the State's building code for both new construction electrification, and EV charging. In transportation, right-sized charging standards became part of State code and CEC programs, while vehicle incentives, EV advisor services, government fleet initiatives, and e-bike programs have all expanded. On the financing side, PCE launched an on-bill finance program in 2022 that has been highly successful and replicated by other CCAs, issued RFPs for third-party financing tools, and is exploring project finance partnerships.

While Peninsula Clean Energy has established the foundation and secured key policy wins for building and vehicle electrification, actual adoption is still at the early stages. Today, approximately 10 percent of vehicles are electric and the equivalent of 1 percent of single-family homes are electrified. Today, Achieving the 2035 goal will require a dramatic increase in participation and sustained investment, as well as favorable policy conditions. The technical potential exists, but success depends on scaling programs quickly and aligning regulatory and market forces to drive widespread adoption.

Power Resources

Power Resources closed the 2020–2025 Strategic Plan period on target for all five KPIs — annual renewable content and emissions factors for both ECOplus and ECO100, and the share of summer peak load served by new capacity. The central achievement was the contracting of 600 MW of new renewable generation and 500 MW of new storage, part of a total of more than 1.4 GW contracted since 2020. This portfolio growth has expanded PCE's resources tenfold, from roughly 100 MW in 2020 to close to 1,000 MW by 2025.

Beyond scale, PCE advanced its capabilities as a sophisticated energy buyer and portfolio manager. The agency issued five Requests for Proposals and one Request for Information for long-term renewable and storage procurement, while building in-house expertise in resource planning and portfolio optimization. The Energy Risk Policy was overhauled to strengthen governance, and the hedging strategy was revised in response to market volatility, including development of an automated hedging model. PCE also implemented the CPUC's Slice of Day resource adequacy framework, supported by new optimization tools that ensured compliance at both year-ahead and month-ahead intervals.

The portfolio itself is now far more resilient and diverse. In 2020, 80 percent of PCE's supply came from just two hedge counterparties; by 2025, PCE procures from 26 counterparties, including 17 long-term PPAs. PCE also became a Scheduling Coordinator in 2021, integrated three grid-scale batteries into its portfolio, and launched a Congestion Revenue Rights strategy that grew from \$2.4 million in revenues in 2021 to \$14.2 million in 2024. PCE

maintained Green-e certification for ECO100 and achieved zero emissions factors in its Power Content Label reporting for 2024 and 2025.

Finally, the Power Resources team itself grew from four to eleven professionals, creating depth, resilience, and the capacity to manage a rapidly expanding portfolio. These achievements underscore that PCE is not only on track for its renewable energy goals, but is also shaping industry standards and demonstrating leadership in the clean energy transition.

Community Energy Programs

Community Energy Programs delivered some of the most visible results of the 2020–2025 Strategic Plan, achieving three of five KPIs: greenhouse gas reductions in buildings, the number of electric appliances installed, and the share of funds directed to low-income customers. Challenges remain in reducing transportation-related emissions and meeting EV charging port targets, though we expect to surpass the goal once projects in the pipeline are completed. Similarly, progress on local resource development has been slower than anticipated, but current projects put us on track to surpass the objective in the next five year planning horizon.

Buildings: Peninsula Clean Energy now runs the largest building electrification program in the Bay Area, with whole-home pilots demonstrating tangible bill savings for participants. Our emphasis on “right-sizing” retrofits to avoid costly electric service upgrades has become a model for the state and was ultimately adopted into state benchmarking practices. Local reach codes, initially championed by PCE and its member jurisdictions, have been influential in shaping statewide adoption and integration into the California building code, significantly accelerating electrification momentum.

Electric Vehicle Charging: PCE’s reach codes established 100 percent EV access requirements in multifamily new construction, ensuring that the highest-need segment is prioritized. This benchmark has now been incorporated into the state’s building code in large part due to PCE’s local success. Two-thirds of new EV charging deployments are now located in multifamily housing, and our work on right-sizing charging infrastructure has set the cost-effectiveness benchmark, adopted by the California Energy Commission and other agencies. While installation numbers remain below target due to market and utility delays, the pipeline is strong, and we expect to ultimately exceed the 2025 goal.

Distributed Resources: PCE advanced distributed energy at both the institutional and residential levels. The GovPV program now spans 36 sites with more than 5 MW of capacity, 12 of which are already complete. When fully built, the program is expected to deliver nearly \$50 million in savings to participating agencies under its innovative financing model. On the residential side, more than 200 income-qualified households are benefiting from new and no-cost solar and storage installations, enhancing resilience and affordability for vulnerable customers. In parallel, we initiated a virtual power plant through a new Distributed Energy Resource Management System (DERMS) platform, laying the groundwork for more advanced demand management and grid support over the next five years. Together, these programs demonstrate Peninsula Clean Energy’s leadership in scaling decarbonization solutions that are both affordable and replicable.

Marketing & Community Relations

Marketing & Community Relations achieved one of three KPIs, meeting strong participation rate goals while aided awareness and favorability targets remained below goal levels. PCE maintained high participation rates with Los Banos and San Mateo County consistently above 85% and overall enrollment reaching nearly 96% in 2024–2025. PCE-aided awareness rose to 41% in 2023, progressing toward the 60% target, while favorability among customers aware of PCE remained consistently high. Residential engagement was broad through programs, campaigns, and events, while engagement with small and medium businesses was more limited but remains a priority for growth.

The team advanced a customer-first approach, launching a Voice of Customer listening engine to systematically gather insights and expanding electrification resources through digital content and events. Brand visibility was strengthened with a new website, a refreshed social media strategy, and implementation of modern marketing tools including ActiveCampaign, Bynder, and Blastpoint. The brand refresh also progressed, aligning PCE's identity with customer expectations and future growth.

Community engagement expanded significantly, with nearly 500 events reaching 24,000 people since 2020 and the outreach grant program growing from 5 grantees in 2020 to 16 in 2025, distributing \$2.2 million across 19 organizations. School programming engaged 7,800 students and educators, while Community Advisory Committee satisfaction improved by 17% between 2021 and 2024. Visibility was further elevated through national and regional media coverage, amplified thought leadership on electrification, and positioning of staff as industry leaders through conferences, publications, and CalCCA awards.

With a strong foundation of customer insights, modernized tools, and proven engagement strategies, Marketing & Community Relations is well positioned for the 2026–2030 Strategic Plan to launch a broad brand awareness campaign, deepen trust with diverse customer groups, expand partnerships, and align brand identity with customer expectations and strategic objectives.

Account Services

PCE achieved three of five KPIs in Account Services during the 2020–2025 Strategic Plan, meeting targets for participation rate, external partner relations, and key account management. Progress has been made on customer data access and analytics, as well as residential and small business engagement, though both remain areas for further development.

Over the plan period, Account Services deepened relationships with key commercial accounts, including bringing more than 25 MWh of load back from the Direct Access program. The team supported Caltrain's electrification planning, expanded outreach to vulnerable customers with over 20 percent of contacted households enrolling in the statewide Arrearage Management Plan, and rolled out UtilityAPI to simplify customer data access. Operational improvements included streamlining the annual Net Energy Metering cash-out process and relaunching collections programs to capture previously uncollected revenue. The launch of an in-house contact center has been particularly impactful, reducing customer opt-outs and providing higher-quality support, which has translated into greater customer satisfaction and retention across our service area.

Public Policy

Public Policy achieved two of five KPIs during the 2020–2025 Strategic Plan — legislative and regulatory impact — while progress on coalition building and fostering CCA growth continues to develop, and challenges persisted with PCIA containment. PCE made strong progress on legislative and regulatory impact during the 2020–2025 Strategic Plan period, building staff capacity and increasing our influence with state and federal leaders. Our team advanced thought leadership on right-sizing electrification and 24/7 carbon-free supply, ensuring that climate progress remains both affordable and accessible.

At the same time, challenges persisted with the California Public Utilities Commission’s handling of the Power Charge Indifference Adjustment, which continues to create financial pressure for CCAs and their customers. Coalition building and CCA growth efforts moved forward but faced headwinds from broader political and regulatory dynamics. Looking ahead, Peninsula Clean Energy will continue to strengthen its policy presence and advocate for reforms that protect customers while advancing decarbonization goals.

Finance

PCE closes the 2020–2025 Strategic Plan period with a strong financial position, achieving four of five key performance indicators: change in net position, days cash on hand, credit rating, and investment performance. Despite rising energy costs, the agency maintained a healthy operating surplus, deferred \$127 million to the Rate Stabilization Fund to help lower customer rates, and ended the period with 385 days cash on hand.

Moody’s upgraded Peninsula Clean Energy’s credit rating to A3 in December 2024, reflecting prudent fiscal management and strong liquidity. A diversified investment structure exceeded benchmarks, while the agency completed a prepay transaction delivering 12% cost savings. The Energy Risk Policy was updated to strengthen governance, and a new cost-of-service ratemaking framework was implemented to reinforce fiscal stability. Challenges remain with managing the average cost of energy, but the agency is well positioned to continue sound financial stewardship.

Organizational Excellence

PCE achieved all four of its organizational excellence KPIs during the 2020–2025 Strategic Plan period: staff satisfaction, innovation impact, organizational policies, and governance. The Agency built its first dedicated Human Resources function, which has grown into a strategic People & Culture team, and implemented an HR Information Software system to support recruitment, performance management, and leadership development. Employee engagement and satisfaction was strengthened through annual surveys, improved benefits, competitive compensation, and enhanced retirement programs.

With respect to innovation and governance, the Agency created a new Innovation Strategy Team and adopted cost-of-service ratemaking. It also completed 90% of its DEAI Action Plan, improved Board communications and orientation materials, and began updating governance documents. These efforts reflect Peninsula Clean Energy’s continued commitment to supporting staff, fostering innovation, and maintaining effective governance practices.

Data/Technology

PCE met all five of its Data & Technology KPIs, reflecting significant progress in strengthening systems, analytics, and IT management. The agency enhanced oversight of organizational systems with greater standardization and centralization, laying a stronger foundation for future scalability and efficiency.

The data warehouse platform was expanded with improved integration, governance, and automated workflows, supported by new code repository and review practices. Analytics tools and dashboards were revamped to increase self-service capabilities and deliver deeper insights. On the IT side, support was streamlined through a centralized ticketing system, asset management was improved for lifecycle planning, and new security measures — including enhanced access controls and an incident response plan — were implemented to safeguard data.

There is much to celebrate and be proud of over the last five years at Peninsula Clean Energy, despite a worldwide pandemic, persistent supply chain and cost issues, significant leadership changes and the emergence of challenging State and Federal policies. PCE staff remains committed to the directional goals articulated in the 2020-2025 strategic plan, which are foundational to the Agency's 2026-2030 Strategic Plan which will be adopted by the Board of Directors in the next few months.

ATTACHMENTS:

[2020-2025 Strategic Plan Goals.docx](#)

Peninsula Clean Energy 2020–2025 Strategic Plan Goals

Top Two Strategic Priorities

1. **Procurement.** Deliver 100% renewable energy on an annual basis by 2030 through strategic and cost-effective procurement of resources that maximize Peninsula Clean Energy's 24/7 hourly matching of renewable energy and load.
2. **Programs.** Contribute to Peninsula Clean Energy member jurisdictions reaching the State's 2045 goal to be 100% greenhouse gas free for transportation and buildings by 2035.

Additional Strategic Plan Goals

3. **Procurement.** Secure sufficient, low cost, clean sources of electricity that achieve Peninsula Clean Energy's priorities while ensuring reliability and meeting regulatory mandates.
4. **Programs.** Implement robust energy programs that reduce GHG emissions, align energy supply and demand, and provide benefits across the community.
5. **Finance.** Employ sound fiscal strategies to promote long-term organizational sustainability.
6. **Account Services.** Ensure high customer retention and satisfaction, maintain strong key account relationships and improve commercial customer access to energy data and analytics
7. **Marketing and Outreach.** Develop a strong brand reputation that drives participation in Peninsula Clean Energy's programs and ensures customer satisfaction and retention.
8. **Public Policy.** Strongly advocate for public policies that advance Peninsula Clean Energy's organizational priorities.
 - a. **Regulatory:** Educate and engage regulatory policymakers to develop policies that support Peninsula Clean Energy's organizational priorities.
 - b. **Legislative:** Engage state and federal legislators to pass legislation and promote policies that advance Peninsula Clean Energy's organizational priorities and defeat legislation and policy initiatives that would hinder them.
9. **Data and Technology:** Increase capabilities and efficient use of data to enable energy-related analyses, program impact measures, and customer insights. Streamline organization-wide IT hardware and software management, and safeguard customer and company information.
10. **Organizational Excellence.** Ensure organizational excellence by adhering to sustainable business practices and fostering a workplace culture of innovation, diversity, transparency, and integrity.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 12, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Leslie Brown Director of Account Services
SUBJECT: Account Services Quarterly Update

BACKGROUND

The purpose of the Account Services team is to provide customer billing support through direct customer interaction, as well as oversee the various processes related to the management of PCE's customer data. This includes relationships with our back-office data manager, Calpine Energy Solutions, and PG&E.

DISCUSSION

The following is a quarterly update from the Account Services team for the third quarter of 2025.

Chatbot Tool

The Account Services team has been developing and testing an AI chatbot that will be deployed on the PCE website in the coming months. The AI chatbot is an addition to our current ticketing software, HappyFox. The chatbot is intended to connect customers with answers to common questions quickly and will be available 24/7. The chatbot rollout will be followed by the implementation of a new live chat feature on our website. The live chat will be staffed by our Customer Success Advisor (CSA) team and will be capable of providing answers to more complex and account-specific questions. We anticipate these new features will increase accessibility and improve the overall customer experience.

Customer Opt-outs Trending Down

Over the course of the year, staff have been tracking a trend of lower customer opt outs that is heading toward a four-year low. Total opt outs from January through June (306) were the lowest total for the first six months of any year since PCE's launch, and through the end of August we're on pace for our lowest annual opt out total since 2021. Los Banos is also on track to have its lowest annual number of opt outs, with each month of 2025 setting a new record monthly low. This substantial shift can be attributed to both the formation of our in-house contact center team and increased on the ground community engagement via PCE's

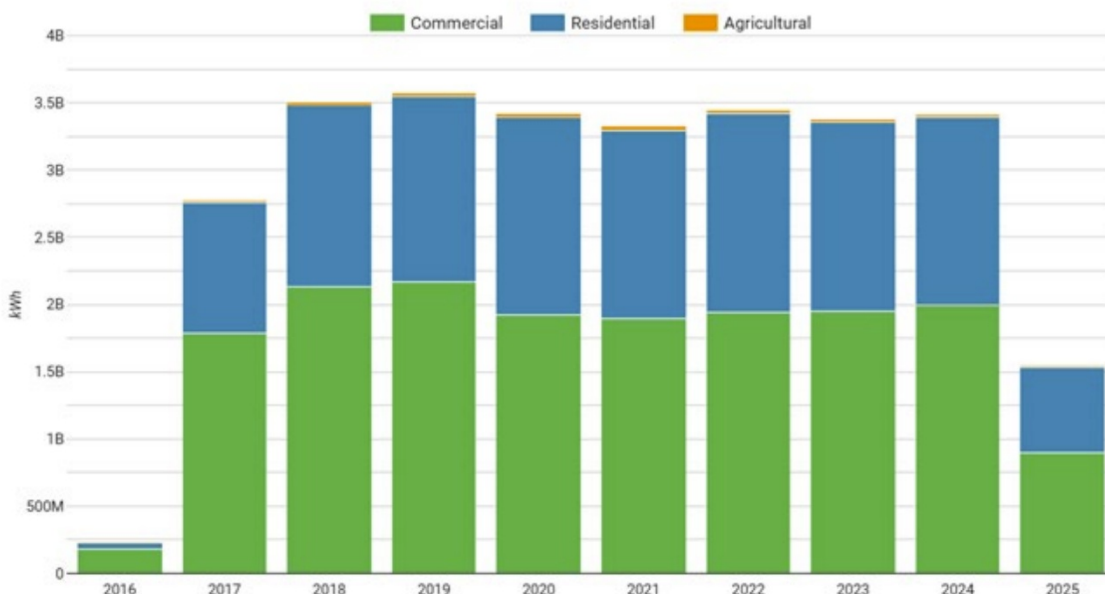
Community Relations Team. Our in-house Customer Success Advisors (CSA's) came on board in October of 2024 and after several weeks of training began taking over live customer calls in December 2024. Their care and attention to detail has greatly elevated our customer experience and retention. We look forward to reporting the success of our in-house contact center's first year of operations in future reports.

Enrollment Statistics

Peninsula Clean Energy's participation rate is currently 97.1%

Town or Territory	Active Customer Count	Eligible Customer Count	Participation Percent
ATHERTON INC	2,706	2,710	100%
BELMONT INC	12,241	12,471	98%
BRISBANE INC	2,493	2,530	99%
BURLINGAME INC	16,800	17,071	98%
COLMA INC	865	872	99%
DALY CITY INC	33,162	34,330	97%
EAST PALO ALTO INC	7,826	8,172	96%
FOSTER CITY INC	14,484	14,767	98%
HALF MOON BAY INC	4,955	5,077	98%
HILLSBOROUGH INC	4,023	4,038	100%
LOS BANOS INC	13,513	15,824	85%
MENLO PARK INC	16,851	17,036	99%
MILLBRAE INC	9,515	9,762	97%
PACIFICA INC	15,054	15,504	97%
PORTOLA VALLEY INC	1,638	1,694	97%
REDWOOD CITY INC	35,160	35,989	98%
SAN BRUNO INC	16,139	16,708	97%
SAN CARLOS INC	14,536	14,687	99%
SAN MATEO INC	44,400	45,353	98%
SO SAN FRANCISCO INC	24,987	25,885	97%
UNINC SAN MATEO CO	24,274	24,717	98%
WOODSIDE INC	2,266	2,272	100%
Total	317,888	327,469	97.1%

Usage by Customer Type



Customer Savings

Beginning in February 2025, Peninsula Clean Energy's lower rates provided electric generation cost savings of 10% compared to PG&E default generation service. Customers with a Power Charge Indifference Adjustment (PCIA) vintage of 2021 or 2022, which includes most of Los Banos customers, have enjoyed savings of 25%-30% in electric generation costs due to negative PCIA rates for those vintages.

To date, customers have saved at over \$210 M on the generation portion of their bills. The typical residential customer is saving about \$72 a year on their bills due to being our customer.

Collection Efforts

The latest group of pre-collections notices went out in June and since then we've collected over \$9,000. The addition of this new process in PCE's collections efforts has resulted in over 150 customers avoiding being sent to our collections partner Optio Solutions, and over \$36,000 in unpaid balances collected since June 2024. The majority of payments have been received electronically through Square, with a handful of customers mailing in checks.

Optio Solutions has continued collection efforts on our behalf for customers that have not responded to our pre-collections communications, and since June has collected over \$8,000 of bad debt. Year-to-date, Optio Solutions has collected over \$16,000 on our behalf. CARE and FERA customers remain in the pre-collections process and are not pursued for collection by Optio Solutions.

Contact Center Updates

As we approach the completion of our first year of operation, the in-house contact center

continues to achieve significant milestones, proving our commitment to delivering exceptional customer support.

Since our go live date, the team has successfully answered 4,136 calls and responded to over 3,000 emails. Our Customer Success Advisors (CSA's) remain dedicated to addressing customers' needs. In addition to resolving day to day inquiries, our CSA's have the opportunity to have in depth conversations with our customers. Through these interactions, the team has helped customers better understand PCE programs and supported them in taking the next steps to apply. The CSA's also work hard to retain customers who call with the intention of opting out. They take the time to explain who we are and the benefits of remaining with Peninsula Clean Energy. Most times turning a potential opt out into a happy customer. Their continued efforts reflect a customer-first mindset and a willingness to go above and beyond to ensure a positive and informed outcome.

The CSA's have also taken on additional training to serve as Electric Vehicle Advisors. Since June, they have assisted more than 80 customers with EV related questions. These interactions provided tailored guidance on Peninsula Clean Energy rebates as well as available Federal rebates. This shows the growing demand for EV support and the team's ability to deliver this service to our customers.

Over the past three months, we successfully re-enrolled three customers. These customers proactively reached out to rejoin after being inactive as PCE customers for over 12 months.

Additionally, the team has implemented a customer satisfaction survey process. At the end of each call, CSA's transfer customers to a survey to gather feedback on their experience. Although not all customers completed the survey, the responses we did receive reflected a 100% satisfaction rate. This is clear evidence that our customers are highly satisfied with Peninsula Clean Energy and the service they receive.

See contact center statistics from June 2025 through August 2025 attached.

Intern Wrap-up

This summer, under the supervision of Senior Analyst Masha Doubrovskaya, Account Services hosted intern Daniel Lin who eagerly took on the task of revitalizing and improving our data visualization dashboards. PCE has an enormous amount of customer data at its fingertips, and Daniel's work helped clean, organize, and visualize this data into usable, presentable dashboards for PCE staff. The dashboards provide easily accessible snapshots of enrollment statistics for leadership, make responding to common data requests more efficient, and allow staff to identify and track new trends. The improvements he made include:

- Visualized usage and energy sales by territory and product, usage by electric service provider, and updated the ranking query for our top 200 commercial accounts
- Identified a data gap which will result in more complete usage data
- Automated a recurring data request that will regularly save staff time
- Developed new methodologies that will be incorporated into agency-wide dashboards

The work and documentation Daniel left will allow PCE staff to continue to maintain and build

upon these dashboards as strategy and priorities evolve. See a sample of his dashboards attached.

Joint Meeting with PG&E and PCE

On August 28, Peninsula Clean Energy hosted about 15 staff from both PCE and PG&E for a morning of collaboration and relationship building. Presenters from both organizations shared updates on strategic priorities, including large load interconnections and electrification programs. PG&E's electrification team was particularly impressed by Rafael Reyes' presentation of PCE's findings that most homes in San Mateo County can fully electrify without service panel upgrades, while PCE staff gained an early look at a geospatial electrification resource soon to be available to PG&E partners like PCE. The PG&E Peninsula Regional Team also provided insights on current and planned efforts in San Mateo County.

The event was organized by PCE's Account Services team in partnership with our PG&E CCA Relations Manager. Their strong collaboration delivers daily benefits to PCE customers, and this meeting laid the groundwork for deeper coordination between PCE and PG&E where priorities align to better serve our shared communities. We look forward to continuing these meetings in the future as appropriate.

ATTACHMENTS:

[ContactCenterStatsJune2025toAugust2025.pdf](#)

Total Calls Answered	Spanish Calls	Mandarin
1561	129	9
Opt Out Submitted	Retained	Re-Enrolled
86	58	3
Emails		
1767		



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 25, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Kim Le, Director of Data and Technology
SUBJECT: Data and Technology Department Quarterly Update

BACKGROUND

Data and Technology at Peninsula Clean Energy (PCE) is made up of two teams, each playing a crucial role in the organization's operations. The Data Team is responsible for managing large volumes of data from various sources, such as customer load usage and energy market data, and ensuring accuracy and accessibility for analysis, reporting, and decision-making. The IT Team oversees the management of our software and hardware systems and ensures the smooth operation of our technology infrastructure and platforms.

DISCUSSION

This report provides a high-level overview of the Data and IT Team accomplishments from the past quarter, reflecting PCE's continued commitment to enhancing data management, strengthening technological infrastructure, and improving operational efficiency.

The Data Team

Over the past quarter, the Data Team has continued to strengthen PCE's data capabilities, delivering meaningful enhancements to infrastructure, analytics, and cross-departmental collaboration.

Key accomplishment include:

Data Integration & Pipeline Reliability – This quarter we improved the accuracy and timeliness of our data pipelines. Key reports are being moved from manual file transfers to automated APIs, and we added monitoring and alerts to catch issues quickly and reduce downtime.

Data Quality & Governance – We resolved issues that had caused duplicate or missing charge data and standardized access controls. These changes make it easier and more secure to ensure the right teams have access to the right data.

Analytics & Tools – Our small team delivered cleaner, easier-to-use dashboard tools. We also created an invoice download tool with automated notifications and repaired data tables to ensure analytics reports run smoothly.

Team & Capacity – To keep pace with growing data and reporting needs, the team is doubling in size from one to two data engineers and will soon welcome a new team member in early October.

The IT Team

This past quarter, the IT Team focused on strengthening cybersecurity and ensuring smooth day-to-day technology operations. Progress was made across IT security, infrastructure, internal support, and planning for future needs.

Key accomplishment include:

Security & Compliance – We advanced our posture with stronger cybersecurity coverage, device and network monitoring, and plans for sandboxed testing. We also aligned on upcoming retention policies and continued policy and guideline improvements.

Software Portfolio – We kicked off a company-wide software audit to catalog tools, owners, and approvals, introducing a request process and risk scoring.

Device & Operating System (OS) Management – We prepared organization-wide OS upgrades and security updates (Windows and macOS), renewed device management, and tightened settings. We also continued to work on laptop builds, warranty handling, and a physical inventory.

Network & Access – We refined VPN deployment and documentation, enforced guest Wi-Fi filtering, and evaluated SSO direction. We also validated IP whitelisting needs.

Conference Rooms & Readiness – We helped develop a user-friendly troubleshooting guide for meeting rooms and ran pre-meeting checks with the Admin Team for cameras, audio, displays, and projectors to improve hybrid meeting reliability.

Service Desk & Knowledge – We expanded staff-facing how-to guides and internal runbooks, making support faster and more self-service. New ticket categories and clearer workflows improved triage and response.

Operations & Support – We improved onboarding/offboarding (including intern wrap-up) on the IT side, managed new-hire equipment, and coordinated repairs without disruption.

The AI Initiatives

Our AI Initiatives continue to focus on building safe, responsible, and practical use of AI across the organization. This quarter we advanced guidelines, training, and tool evaluations to help staff adopt AI effectively and securely.

Key accomplishment include:

Guidelines & Governance – We drafted clear AI User Guidelines and set a staged rollout plan. The guidelines emphasize approved tools, no sensitive data, and user responsibility for

outputs, with periodic reviews to keep pace with the landscape. Guidance reinforces minimal data exposure and careful records practices.

Training & Adoption – We designed a mandatory AI Essentials course and follow-on Core and Advanced sessions. Live demos and office hours support a “learn together” culture, with power-user check-ins to surface best practices and guardrails. We aim to make it clear and approachable for all experience levels.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 11, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Kelly Lew-Quintal, Risk Manager

SUBJECT: Energy Supply Procurement Quarterly Update

BACKGROUND

In November 2024, the Board of Directors (Board) approved Policy Number 23 (Energy Risk Policy) which requires that a summary of all short-term energy procurement contracts (terms of less than five (5) years) be reported to the Board quarterly.

DISCUSSION

This memo summarizes all short-term energy procurement contracts entered into by the Chief Executive Officer or the Senior Director of Power Resources since the Board meeting in May 2025.

Execution Month	Purpose	Counterparty	Term
May	Purchase of Hedge Energy	Morgan Stanley Capital Group Inc.	3 months
May	Purchase of Hedge Energy	Morgan Stanley Capital Group Inc.	3 months
May	Sale of Hedge Energy	Morgan Stanley Capital Group Inc.	3 months
May	Purchase of Hedge Energy	Triolith Energy Fund, LP	3 months
May	Purchase of Hedge Energy	Triolith Energy Fund, LP	3 months
May	Sale of Hedge Energy	NextEra Energy Marketing, LLC	3 months
May	Sale of PCC1 Energy	NRG Business Marketing LLC	2 months
May	Purchase of Resource Adequacy	Orange County Power Authority	12 months
June	Purchase of Hedge Energy	BP Energy Company	1 month
June	Sale of Resource Adequacy	BP Energy Company	1 month
July	Purchase of Resource Adequacy	Shell Energy North America (US), L.P.	1 month
July	Sale of Resource Adequacy	Calpine Energy Services, L.P.	1 month
July	Purchase of Resource Adequacy	Big Beau Solar, LLC	1 month

August	Sale of Import Allocation Rights	City of Riverside	12 months
August	Sale of Resource Adequacy	Clean Energy Alliance	2 months
August	Purchase of Resource Adequacy	Ava Community Energy Authority	1 month
August	Sale of Resource Adequacy	Central Coast Community Energy	2 months
August	Purchase of Resource Adequacy	Central Coast Community Energy	2 months
August	Sale of Import Allocation Rights	City of Riverside	12 months
August	Sale of Resource Adequacy	Clean Energy Alliance	12 months

STRATEGIC PLAN

The above contracts were executed in May 2025, June 2025, July, 2025, and August 2025 to support the Power Resources Objective 2 for Procurement: Procure power resources to meet regulatory mandates and internal priorities at affordable cost.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 16, 2025
MEETING DATE: September 25, 2025
VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors
FROM: Jeremy Waen, Senior Director of Regulatory Policy
SUBJECT: Regulatory Policy Team Quarterly Update

DISCUSSION

California Public Utilities Commission (CPUC)

Power Charge Indifference Adjustment (PCIA) Reform

On June 26, 2025, the CPUC adopted Decision 25-06-049, which set a new methodology for how Resource Adequacy (RA) transactions inform the Market Price Benchmark (MPB) used to calculate the Power Charge Indifference Adjustment (PCIA). The PCIA is intended to reflect the difference between the original contract price and the current market value of resources in the Investor-Owned Utilities' (IOU) generation portfolios. Any above-market costs appear on CCA customer bills as PCIA charges.

The CPUC's new decision alters how capacity contracts factor into the MPB by including outdated pricing for multi-year contracts, rather than relying solely on current-year transactions. In the near term, this change reduces the capacity value within the MPB and is expected to significantly increase PCIA charges for PCE customers, though the precise cost impacts are still unclear. Over the longer term, the new methodology may provide somewhat greater stability by dampening year-to-year swings in RA market valuations.

Despite strong comments from PCE and CalCCA highlighting the methodological flaws and inconsistencies with mark-to-market principles, the CPUC adopted the revised approach. The Commission also narrowed the set of transactions eligible for inclusion in the MPB, excluding trades between affiliates, swaps, and sleeve contracts, further reducing the representativeness of the benchmark.

The CPUC is expected to open a second phase of this proceeding to address the PCIA portfolio more broadly. PCE is actively working within CalCCA to develop proposals that could mitigate these impacts and improve fairness for CCA customers.

Integrated Resource Planning (IRP)

The CPUC convened a series of workshops on stakeholder proposals to improve the proposed Reliable Clean Power Procurement Program (RCPPP). In addition to commenting on CPUC staff proposals, PCE advanced three key recommendations: (i) guarantee CCAs the right to self-procure and opt out of central IOU procurement, (ii) streamline compliance filings, and (iii) protect early-moving load-serving entities from penalties if a new procurement requirement is adopted. The CPUC has not yet indicated next steps for developing the RCPMP, so further proposal development is on hold. Given the significant implications for PCE's procurement strategy and compliance obligations, PCE will remain actively engaged in the process.

California Independent System Operator (CAISO)

The CAISO continues to implement stakeholder processes that are likely to have critical impacts on PCE's operations, particularly relating to our procurement objectives. Timely updates from these processes include:

1. Resource Adequacy ("RA") Modeling and Program Design:

CAISO is advancing reforms to its separate RA program, which operates in parallel with the CPUC's program and applies to all California load-serving entities, including publicly owned utilities not regulated by the CPUC. Key issues under review include resource counting, Planning Reserve Margin requirements, outage substitution, and, in a later phase, rules governing Import Capability allocations.

To date, PCE has successfully advocated for alignment between the CAISO and CPUC programs so that compliance with CPUC requirements should also satisfy CAISO's. PCE is also playing a leading role in shaping substitution rules to create a more liquid RA market and in advancing reforms to the import capability framework.

- #### **2. Demand and Distributed Energy Market Integration ("DDEMI"):**
- PCE is actively participating in efforts to develop new models that allow Demand Response and behind-the-meter distributed resources to bid into CAISO markets and earn revenues for responding to dispatch instructions. Once complete, these simplified, lower-barrier participation models could help DERs more fully capture the value they provide to the grid by operating in alignment with system needs.

STRATEGIC PLAN

(Public Policy Objective A, Key Tactic 1, and Key Tactic 2; Public Policy Objective C, Key Tactic 3)



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Executive Committee

FROM: Nelly Wogberg, Board Clerk

SUBJECT: Acronym List

ATTACHMENTS:

[ACRONYMS - as of 02-01-2024.pdf](#)

COMMONLY USED ACRONYMS AND KEY TERMS

AB xx – Assembly Bill xx
ALJ – Administrative Law Judge
AMP - Arrears Management Plans
Apple Valley Choice Energy
AQM – Air Quality Management
Ava – Formally East Bay Community Energy
BAAQMD – Bay Area Air Quality Management District
BLPTA – Buyer Liability Pass Through Agreement
CAC – Citizens Advisory Committee
CAISO – California Independent System Operator
CalCCA – California Community Choice Association
CAM – Cost Allocation Mechanism
CAP – Climate Action Plan
CAPP – California Arrearage Payment Program
CARB – California Air Resources Board, or California ARB
CARE - California Alternative Rates for Energy Program
CBA – California Balancing Authority
3CE- Central Coast Community Energy (Formerly Monterey Bay Community Power-MBCP)
CCA – Community Choice Aggregation (aka Community Choice Programs (CCP) or
CCE – Community Choice Energy (CCE)
CCCFA – California Community Choice Financing Authority
CC Power – California Community Power
CEC – California Energy Commission
Clean Energy Alliance – CCA in
CPA – Clean Power Alliance
Clean Power SF
CPP - Critical Peak Pricing
CPSF – Clean Power San Francisco
CPUC – California Public Utility Commission (Regulator for state utilities) (Also PUC)
CSD – California Department of Community Services and Development
CSGT - Community Solar Green Tariff
Customer Centricity - culture, framework and business strategy based on providing a positive customer experience and building long-term relationships
DA – Direct Access
DAC-GT - Disadvantaged Communities Green Tariff
DER – Distributed Energy Resources
Desert Community Energy
DG – Distributed Generation
DOE – Department of Energy
DR – Demand Response
DRP – Demand Response Provider
DRP/IDER – Distribution Resources Planning / Integrated Distributed Energy Resources
EBCE – East Bay Community Energy now known as Ava Community Energy
ECOplus – PCE’s default electricity product, 50% renewable and 50% carbon-free (in 2021)
ECO100 – PCE’s 100% renewable energy product

EDR – Economic Development Rate
 EE – Energy Efficiency
 EEI – Edison Electric Institute; Standard contract to procure energy & RA
 EIR – Environmental Impact Report
 ELCC – Effective Load Carrying Capability
 EPIC – Energy for Palmdale’s independent Choice
 ESP – Electric Service Provider
 ESS – Energy Storage Systems
 ESSA – Energy Storage Services Agreement
 ERRA – Energy Resource Recovery Account
 EV – Electric Vehicle
 EVSE – Electric Vehicle Supply Equipment (Charging Station)
 FERA- Family Electric Rate Assistance Program
 FERC – Federal Energy Regulatory Commission
 FFS – Franchise Fee Surcharge
 GHG – Greenhouse gas
 GHG-Free – Greenhouse gas free
 GTSR – Green Tariff Shared Renewables
 GWh – Gigawatt Hours (Energy) = 1000 MWh
 Heavy Duty Vehicle – large vehicles such as busses and long-haul trucks
 HPWH – Heat Pump Water Heater
 HP HVAC – Heat Pump Heating, Ventilation, and Air Conditioning
 HR xx – House of Representatives Bill xx
 IDER – Integrated Distributed Energy Resources
 IGFC – Income Graduated Fixed Charge
 IOU – Investor-Owned Utility (e.g. PG&E, SCE, SDG&E)
 IJJA – Infrastructure Investment and Jobs Act
 IRA – Inflation Reduction Act
 IRP – Integrated Resource Plan
 IVR – Interactive Voice Response
 ITC – Investment Tax Credit (it’s a solar tax credit)
 JCC – Joint Cost Comparison
 JPA – Joint Powers Authority
 JRC – Joint Rate Comparison
 JRM – Joint Rate Mailer
 kW – kilowatt (Power)
 kWh – Kilowatt-hour (Energy)
 Lancaster Energy
 Light Duty Vehicle - passenger vehicles such as cars and small pickup trucks
 LDS – Long Duration Storage
 LDES – Long Duration Energy Storage
 LIHEAP- Low Income Home Energy Assistance Program
 Load Shaping – changing when grid energy is used
 LSE – Load Serving Entity
 MCE – Marin Clean Energy
 Methane Gas - formerly known as ‘natural gas’
 Microgrid – building or community energy system
 Mid Duty Vehicle – vehicles such as passenger vans
 MW – Megawatt (Power) = 1000 kW
 MWh – Megawatt-hour (Energy) = 1000 kWh

MTR – Mid-Term Reliability
 MUD – Multi-unit Dwelling
 NBCs – non-bypassable charges
 NBT – Net Billing Tariff
 NEM – Net Energy Metering
 NERC – North American Electric Reliability Corporation
 NDA – Non-Disclosure Agreement
 NG – Natural Gas
 OBF – On-bill Financing
 OBR – On-bill Repayment
 OCPA – Orange County Power Authority
 OES – Office of Emergency Services
 OIR – Order Instituting Rulemaking
 PACE – Property Assessed Clean Energy
 PCC – Portfolio Content Category (aka “buckets”) – categories for RPS compliance
 PCC1 – Portfolio Content Category 1 REC (also called bucket 1 REC)
 PCC2 – Portfolio Content Category 2 REC (also called bucket 2 REC)
 PCC3 – Portfolio Content Category 3 REC (also called bucket 3 REC or unbundled REC)
 PCEA – Peninsula Clean Energy Authority
 PCIA – Power Charge Indifference Adjustment
 PCL – Power Content Label
 Pioneer Community Energy
 PLA – Project Labor Agreement
 POU – Publicly Owned Utility
 Pomona Choice Energy
 PPA – Power Purchase Agreement
 PPSA – Project Participation Share Agreement (CC Power)
 PRIME – Pico Rivera innovative Municipal Energy
 PSPS – Public Safety Power Shutoff
 PV – Photovoltaics (solar panels)
 Rancho Mirage Energy Authority
 RA – Resource Adequacy
 RE – Renewable Energy
 REC – Renewable Energy Credit/Certificate
 Redwood Coast Energy Authority
 RICAPS - Regionally Integrated Climate Action Planning Suite
 RPS – California Renewable Portfolio Standard
 S xx – US Senate Bill xx
 SB xx – CA Senate Bill xx
 Santa Barbara Clean Energy
 SBP – Solar Billing Plan
 SCP – Sonoma Clean Power
 SDCP – San Diego Community Power
 SJCE – San Jose Clean Energy
 San Jacinto Power
 SJVAPCD - San Joaquin Valley Air Pollution Control District
 SMD – Share My Data, interval meter data
 SQMD – Settlement Quality Meter Data
 SVCE – Silicon Valley Clean Energy
 TOB – Tariff on Bill

TOU Rates – Time of Use Rates

Valley Clean Energy

VGI – Vehicle-Grid Integration

V2G – Vehicle-to-Grid

VPP – Virtual Power Plant

WECC – Western Energy Coordinating Council

WREGIS – Western Renewable Energy Generation Information System

WSPP – Western Systems Power Pool; standard contract to procure energy and RA

WWGPI - West-Wide Governance Pathways Initiative



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Nelly Wogberg, Board Clerk

SUBJECT: Report on California Community Power (CCP) Joint Powers Authority

ATTACHMENTS:

[CA Community Power Board Report - August 20, 2025.pdf](#)

California Community Power

901 H St, Ste 120 PMB 157, Sacramento, CA 95814 | cacomunitypower.org

TO: Board of Directors and Alternates **DATE:** 8/28/25
FROM: Alex Morris – General Manager
SUBJECT: **Report on Regular Board of Directors Meeting – August 20, 2025**

The California Community Power (CC Power) Board of Directors held a meeting on August 20, 2025, via Zoom. Details on the Board packet, presentation materials, and public comment letters can be found under the Meetings tab at the CC Power website: [Meetings and Agendas – ca community power](#)

Highlights of the meeting included the following:

- **Matters subsequent to posting the Agenda.** None.
- **Public Comment.** None.
- **Consent Agenda** - The Board approved the following items:
 - Minutes of the Regular Board Meeting held on June 18, 2025
- **Regular Agenda Items:**
 - **Strategic Plan Refresh – Scope and Timeline (Discussion Item):** The Board reviewed and discussed a project plan for augmenting the CC Power Strategic Plan, referred to as a ‘strategic plan refresh’. The goal of this refresh is to consider and potentially select offerings, services, capabilities, or functional abilities for which CC Power will plan and prepare to provide in future years, e.g. 2030. This refresh effort builds upon and is not intended to deviate from the existing strategic plan, under which CC Power’s members are required to ‘opt-in’ to projects of interest based on a phased project-exploration approach. The next step of the refresh involves surveying members about planning horizons and potential priorities. The Board’s will discuss these matters at the in-person CC Power Member Forum in October. An *Ad Hoc* Committee of Lori Mitchell (San Jose Clean Energy), Howard Chang (Ava Community Energy), Monica Padilla (Silcon Valley Clean Energy), and Mitch Sears (Valley Clean Energy) will oversee this effort. The refresh is expected to conclude in late 2025 or early 2026.
 - **Draft Policy on Operating Capital and Reserves (Discussion Item)** – General Manager Morris and Treasurer Mitch Sears (Valley Clean Energy) introduced a draft policy for Board discussion. The draft policy stipulates how CC Power would accrue working capital and how excess funds, if any, from different categories of CC Power’s operations would be retained, returned to members, or applied forward to reduce future invoicing needs. Based on estimates, the draft policy, if enacted, would direct a ‘reserves’ target of approximately \$1.3M. This target would cover specified discretionary and non-project costs for up to six months. Other costs, including

A Joint Powers Agency whose members are:
Ava Community Energy | Central Coast Community Energy | CleanPowerSF | Peninsula Clean Energy |
Redwood Coast Energy Authority | San José Clean Energy | Silicon Valley Clean Energy | Sonoma Clean Power |
Valley Clean Energy

power project costs, would be excluded from this 'reserves' calculation because such costs are recovered directly from participating members through stand-alone project agreements or are discretionary. Feedback from the Board discussion will be incorporated, and a draft final policy will be brought to the board at a future meeting.

- **General Manager Report:** The Tumbleweed Energy Storage project is under active construction and planned for operations in April 2026. The Goal-Line Energy Storage Project was terminated and settled pursuant to Board authorization. Funds from this \$4.5M settlement will be returned to members based on project shares. Updates on numerous other topics were provided, including on the in-person Member Forum in October, 2025-2026 fiscal year invoicing, various joint-action exploration and learning activities, and actions taken under the General Manager's delegated signing authority.



PENINSULA CLEAN ENERGY AUTHORITY
JPA Board Correspondence

DATE: September 19, 2025

MEETING DATE: September 25, 2025

VOTE REQUIRED: None

TO: Honorable Peninsula Clean Energy Authority Board of Directors

FROM: Brianna Arroyo, Administrative Assistant

SUBJECT: Social Media FAQ's

ATTACHMENTS:

[PCE_ How to handle comments on Nextdoor.pdf](#)

[PCE_ Social media talking points.pdf](#)

How to handle comments on Nextdoor

What qualifies as an incendiary comment?

- The post contains aggressive or accusatory language.
- The post spreads misinformation about PCE's programs, services, or billing—or about clean energy.
- The post escalates negativity within the Nextdoor community, even if the original post is not negative.

How do I know if PCE should respond?

- ☐ Does the comment contain misinformation that could harm PCE's reputation?
- ☐ Is the comment receiving significant, negative attention (likes, replies, etc.)?
- ☐ Does responding to the post align with PCE's values and commitment to candor, transparency, and community support?
- ☐ Is someone asking a question related to PCE's billing or services?

It may be helpful to respond proactively, even if the original comment isn't particularly negative. This early intervention can help prevent misinformation and keep the community conversation on track.

I found an incendiary comment. What should I do next?

1. **Notify the Marketing team.**

Send an email with the subject line: "Nextdoor comment for review" with a direct link to the post and any necessary screenshots to the following PCE team members:

- Aleisha Juarez, ajuarez@peninsulacleanenergy.com
- Kerstin Grune (cc'd), kgrune@peninsulacleanenergy.com
- Gwen Rose (cc'd), grose@peninsulacleanenergy.com
- Kirsten Andrews-Schwind (cc'd), kandrews-schwind@peninsulacleanenergy.com
- Jayden Hanan (cc'd), jhanan@peninsulacleanenergy.com

2. **Be prepared to take action.**

Given Nextdoor's limited access, we may ask you to respond via your personal profile. If the Marketing team confirms that a response is necessary, we will provide you with the appropriate post copy.

Helpful reminders

- When you see a negative Nextdoor comment, be a calm observer and collect details for escalation.
- Do not engage with incendiary comments, unless the Marketing team provides you with post copy.
- Responses on behalf of PCE should always reflect the organization's values.
- Stay ahead of the negativity: Responding to questions early can help keep the tone positive and prevent the situation from escalating.

Social media FAQs

Here are some helpful tips for responding to frequently asked questions about Peninsula Clean Energy (PCE) on social media. Frame your response in a way that is accurate, concise, and friendly—all while staying true to PCE's mission and values. Feel free to adapt these prompts to your own voice, keeping it casual, personable, and polite.

Depending on the social media platform, your response could also encourage people to contact PCE Support for more information at info@peninsulacleanenergy.com or 1-866-966-0110.

What is Peninsula Clean Energy (PCE)? How is PCE different from PG&E?

PCE is your local, not-for-profit electricity provider. PCE provides the majority of the electricity supply—97% in fact—for San Mateo County and Los Banos.

PCE provides you with clean electricity, while PG&E delivers it to you through their wires. It's kind of like ordering takeout from your favorite restaurant (PCE) and having a food delivery service (PG&E) deliver it to your door.

Does PCE cost more than PG&E?

No! PCE's rates are competitive with or even lower than PG&E's, so you save money with PCE. You can compare PCE's and PG&E's rates here:

https://www.pge.com/assets/pge/docs/account/alternate-energy-providers/pce-sm_rateclasscomparison.pdf

Why was I automatically enrolled?

Your city or county voted to join PCE to bring cleaner, affordable energy to your community.

Can I opt out of PCE?

Yes, you can opt out. However, PCE's rates are typically lower than PG&E's, so opting out of PCE will make your electricity bill go up.

I opted out of PCE and my bill went down.

When you opted out of PCE, PG&E put you on a special temporary rate (TBCC) for six months. Recently, this rate has been lower than PCE's, which is probably why your bill went down. However, after six months, you'll be switched back to PG&E's regular rates, which are at least 5% higher than PCE's. So, even though it seems like you're saving money now, your bill will likely go up in the long term.

What clean energy options do I have?

You are automatically enrolled in ECOplus, which is 100% clean, 50% from renewable sources, and cheaper than PG&E. If you want to do even more good for the environment, you can upgrade to ECO100, which is 100% renewable energy for a small additional cost.

I have solar power. Why do I still have fees?

PCE only charges for the electricity you use beyond what your solar panels generate. If your panels produce less energy than your household needs, you'll see charges for the extra electricity you pulled from the grid. However, if your solar panels generate more energy than you use, PCE gives you a credit!

Why did my bill go up after switching to PCE?

Your bill increase is likely due to PG&E's delivery rates, not PCE. In fact, PCE has frozen rates multiple times to keep costs stable and put savings back in customers' pockets.