Safety

Lead
Meet & Guide
Emergency Personnel

CPR

Earthquake Drop
Cover Hold

AED

Evacuation Plan

911/3-3622

Active Shooter
Get Out / Call Out
Hide Out
Take Out

Melissa
Peter
Scott
All
Ryan
All

Marcela
Jose
What is a Platform to EE?

A platform is a ruleset that governs how regulatory objectives are connected to market actors and activities.

The platform provides the ruleset to connect the two.
<table>
<thead>
<tr>
<th>Portfolio</th>
<th>EE’s collection of Sector-focused programs that enable energy savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sectors</td>
<td>Customer-centric categories that are the building blocks of our portfolio</td>
</tr>
<tr>
<td>Market Sectors</td>
<td>Res, Commercial, Public, Industrial, Agriculture, Cross-Cutting</td>
</tr>
<tr>
<td>Cross-Cutting</td>
<td>Codes &amp; Standards, WE&amp;T, Emerging Technologies, Finance</td>
</tr>
<tr>
<td>Program</td>
<td>A collection of strategies designed to achieve sector and portfolio goals</td>
</tr>
<tr>
<td>Platform</td>
<td>Rule sets for how PG&amp;E measures, pays for and claims energy savings: Deemed, Custom, Financing, Meter-Based Savings</td>
</tr>
<tr>
<td>Enabler</td>
<td>Drivers that influences portfolio, sector and program activities</td>
</tr>
</tbody>
</table>
Today we will be covering...

- Solicitation Updates
- Cross-Platform Rules
- Deemed
- Custom
- Meter-Based
- Financing
## PG&E Energy Efficiency Solicitation Timeline

**6/29/18**

<table>
<thead>
<tr>
<th>Description</th>
<th>Q3 2018</th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
<th>Q1 2021</th>
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<tbody>
<tr>
<td><strong>Phase 1:</strong> Resource Programs</td>
<td>RFA</td>
<td></td>
<td></td>
<td></td>
<td>Launch</td>
<td>Launch</td>
<td>Launch</td>
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<td>Launch</td>
<td>Launch</td>
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<tr>
<td>[25% Minimum Target]</td>
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<tr>
<td><strong>Phase 2:</strong> Statewide Programs</td>
<td>RFA</td>
<td>RFA</td>
<td>RFA</td>
<td>RFA</td>
<td>Launch</td>
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<tr>
<td></td>
<td>WE&amp;T Career and Workforce Readiness</td>
<td></td>
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<td></td>
<td></td>
<td>Residential New Construction</td>
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<td>Non-Residential New Construction</td>
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<td>WE&amp;T K-12 Connections</td>
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<td>State of CA / Dept. of Corrections</td>
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<tr>
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<td></td>
<td>Deemed Platform Support</td>
<td></td>
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<tr>
<td><strong>Phase 3:</strong> Resource Programs</td>
<td>RFA</td>
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</tr>
</tbody>
</table>

*The Solicitation Schedule is subject to change and revision…constantly*
When Will You Use Today’s Content?

Request For Abstract (RFA)
High Level Program Concept

What Platforms Do You Plan to Use?
In What Proportion?

Request For Proposal (RFP)
Fully Detailed Program Proposal

Demonstrate Understanding and Adherence to Energy Savings Rulesets

For the latest PG&E EE Solicitations updates and other useful information, check out

https://www.pge.com/eesolicitations
Solicitations Questions?

Matthew.Braunwarth@pge.com
So you want a crash course in energy efficiency?
Chapter 2: Cross-Platform

Please read:

REGULATING
ENERGY
EFFICIENCY

16 pages
Chapter 2: Cross-Platform

Please read:

ENERGY EFFICIENCY POLICY MANUAL

Version 5
July 2013

106 pages

CALIFORNIA STANDARD PRACTICE MANUAL

ECONOMIC ANALYSIS OF DEMAND-SIDE PROGRAMS AND PROJECTS

37 pages
Chapter 2: Cross-Platform

Please read:

Energy Efficiency Savings Eligibility at Sites with non-IOU Supplied Energy Sources — Guidance Document
20 pages

Early Retirement Using Preponderance of Evidence
20 pages

Industry Standard Practice Guide
33 pages
# Chapter 2: Cross-Platform

Please read:

<table>
<thead>
<tr>
<th>Document ID</th>
<th>Pages</th>
<th>Document ID</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>D.09-09-047</td>
<td>401 pages</td>
<td>D.14-10-046</td>
<td>179 pages</td>
</tr>
<tr>
<td>D.11-07-030</td>
<td>52 pages</td>
<td>D.15-10-028</td>
<td>311 pages</td>
</tr>
<tr>
<td>D.11-07-030, Attachment A-B</td>
<td>28 pages</td>
<td>D.16-08-019</td>
<td>115 pages</td>
</tr>
<tr>
<td>D.12-05-015</td>
<td>488 pages</td>
<td>D.18-01-004</td>
<td>98 pages</td>
</tr>
<tr>
<td>D.12-11-015</td>
<td>148 pages</td>
<td>D.18-05-041</td>
<td>214 pages</td>
</tr>
</tbody>
</table>
Chapter 2: Cross-Platform

Please read:

**Total pages: 3,099**

130 pages

703 pages
Not all of these pages are really important…

…but how will you know unless you read it all?
Chapter 2: Cross-Platform

Maybe there’s a better way?

PG&E Resource
Savings Rulebook
Why do we need rules?

• The CPUC reports evaluated accomplishments to the legislature

• Rules help align our claims (upfront estimates) with evaluated accomplishments
Chapter 2: Cross-Platform

Cross-Platform rules apply “across platforms”

• The overarching rules of California-regulated energy efficiency

• Apply to all existing platforms – and any new platform
Regardless of what platform you’re interested in – you MUST read this chapter!
Chapter 2: Cross-Platform

Steps to take for any measure:

1. Is this eligible?

2. What is the measure application type?*

3. What is the baseline?

4. What are the ex ante values?*
Chapter 2: Cross-Platform

1. Eligibility

- Must pay Public Purpose Programs surcharge
- No double dipping / double counting
- Adhere to all laws and codes
Chapter 2: Cross-Platform

2. What is a Measure Application Type (MAT)?

A MAT describes how the measure is applied to a site, system, or equipment.

There are currently six:

- New Construction
- Normal Replacement
- Accelerated Replacement
- Building Weatherization*
- Behavioral, Retrocommissioning, and Operational
- Add-on Equipment
Chapter 2: Cross-Platform

The MAT indicates how you get your other ex ante values

If you get the MAT wrong, you will get everything else wrong!
Chapter 2: Cross-Platform

3. Determine Baseline

There are currently three:

- Code / Standard Practice
- Existing Conditions
- Dual (a combination of the above two)
Chapter 2: Cross-Platform

4. What are Ex Ante Values?

• All of the components of a claim

• All factor into cost-effectiveness calculations

• Include:
  – Benefits: energy savings, effective useful life, net-to-gross
  – Costs: non-incentive costs (admin, marketing, etc.), incentives, measure costs
Chapter 2: Cross-Platform

Key Take Aways...

Cross-Platform rules apply to everything in the portfolio

You must read the Cross-Platform rules for a complete view of any single platform
Cross-Platform Questions?

Ryan.Chan@pge.com
Chapter 3: Deemed Platform

What does “deemed” mean?

- Pre-determined estimates of energy or demand savings, costs, and other ex-ante values

- Attributable to individual EE measures implemented in particular scenarios (by building type, climate zone, delivery channel, etc.)

- Repeatable and replicable calculations
Values are not site specific and are dependent on approved workpapers (predetermined estimates)

Typically only for 1 to 1 replacements (per unit savings + incentive)

Purchase and installation occur prior to application submittal, but equipment must meet pre-determined measure requirements to qualify
Chapter 3: Deemed Platform

Deemed measures must be supported by CPUC-approved workpapers

**Word document:** narratives that shall align with and clearly tie to the values in the ex-ante excel data submittal

**Data reporting workbook:** all measures must use the approved ex-ante specification template that contains four tables with all of the parameters required to claim ex ante savings and calculate cost effectiveness

Current approved workpapers can be found at [www.deeresources.net/workpapers](http://www.deeresources.net/workpapers)
Chapter 3: Deemed Platform

DEER and Non-DEER Values

DEER (Database of Energy Efficiency Resources)

- Database located at www.deeresources.com that includes EE technology information and measures
- Updated annually via Resolution by September 1st

Non-DEER

- Must use DEER assumptions, methods, and data in development of non-DEER values when appropriate
- If DEER values not available, new values may be proposed to Commission Staff for review and approval
# Chapter 3: Deemed Platform

## Workpaper Submittal Process

<table>
<thead>
<tr>
<th>Workpaper Types</th>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Categorization Criteria</strong></td>
<td>• Effective date January 1(^{st}) of next year</td>
<td>• Effective date other than January 1(^{st})</td>
</tr>
<tr>
<td></td>
<td>• DEER updates</td>
<td>• Non-DEER updates</td>
</tr>
<tr>
<td></td>
<td>• Other source updates</td>
<td>• Code changes</td>
</tr>
<tr>
<td></td>
<td>• Other non-DEER workpapers submitted before January 1(^{st}) of next year</td>
<td>• Updates based on E-4818</td>
</tr>
<tr>
<td><strong>Submittal Deadline</strong></td>
<td>• By January 1(^{st}) of the DEER update year</td>
<td>• March – December, 1(^{st}) and 3(^{rd}) Mondays</td>
</tr>
<tr>
<td><strong>CPUC Review Timeline</strong></td>
<td>• By March 1(^{st})</td>
<td>• 15-day preliminary + 25-day detailed</td>
</tr>
<tr>
<td></td>
<td>• Interim approval if not reviewed</td>
<td>• Interim approval if not reviewed</td>
</tr>
<tr>
<td><strong>Savings Values Application</strong></td>
<td>• If reviewed, can be <strong>retroactive</strong> to January 1(^{st})</td>
<td>• Future date</td>
</tr>
<tr>
<td></td>
<td>• If not reviewed, future date</td>
<td></td>
</tr>
<tr>
<td><strong>Workpaper Effective Date</strong></td>
<td>• January 1(^{st}) of DEER update year, may be updated again based upon March 1(^{st}) disposition</td>
<td>• Pass through if CPUC approves or 25-days have passed since submittal without review</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• New workpapers with effective dates other than January 1(^{st}) only reviewed Mar - Dec</td>
</tr>
</tbody>
</table>
Chapter 3: Deemed Platform

Statewide Workpapers

**Statewide Workpapers:** only one workpaper may be submitted for each set of measures adopted by more than one PA and must include measures, energy impacts, and costs valid for all relevant service territories.

**Submittals:** PG&E currently accepts, reviews, and submits to the CPUC implementer-derived workpapers, often leveraging the California Technical Forum (Cal TF) for review and vetting.
Chapter 3: Deemed Platform

Quality Assurance/Quality Control

Validation: Implementers must be able to enforce and confirm that installed equipment meets measure eligibility requirements.

QPLs: Can be used to make it easier to identify equipment that meets pre-determined measure requirements.

Project inspections: PG&E Central Inspection Program (CIP) will create and maintain CIP Procedures for all deemed measures offered in its portfolio.
Chapter 3: Deemed Platform

Key Take Aways…

Deemed values are pre-determined estimates and are replicable and repeatable.

All deemed measures must be supported by CPUC-approved workpapers and are expected to reflect all relevant CPUC guidance.

CPUC can provide direction to retroactively make workpaper changes, therefore measures, ex ante values, and eligibility can change.
Deemed Questions?

Mananya.Chansanchai@pge.com
Chapter 4: Custom Platform

How is Custom Different

1. Project Development
2. Project or Ex Ante Review
3. Project Approval
4. Post Install
5. Post Install Project Review
6. Post Install Payment
Chapter 4: Custom Platform

Use Cases

• Complex
• Medium-to-large size
• Requires site-specific analysis
Chapter 4: Custom Platform

Eligibility

• No like-for-like replacements
• Deemed measures must go deemed
Influence Requirements

• Every project must document influence
• Approval before implementation
• Project scope changes must be approved
Measure/Project Analysis Requirements

- Only projects that reduce grid purchases are eligible
- Use DEER values and methodologies
- Include M&V Plan
- Calculations must be reviewable
Incentive Structure Guidelines

- Incentive structure proposed by Program Implementers
- Select from available tiers
- Consider: measure EUL, innovative/emerging technology, to-code/above-code, high capital cost/low cost, hard-to-reach
Chapter 4: Custom Platform

QA/QC

Pre-installation Inspection
• Early Review and Policy Review
• Technical Review
• Approval Expiration
• Ex Ante Review Requirements
Key Take Aways…

• Project analyses are site-specific
• Deemed projects must go deemed
• Custom projects must use DEER values and methodologies, must include an M&V Plan
• Every custom project will be QA/QC reviewed by PG&E
Custom Questions?

Scott.Fable@pge.com
Chapter 5: Meter-Based Platform

Disclaimer: Platform Still Evolving

Overview: Estimating Savings With Energy Consumption Data

Savings = *what energy usage would have been without intervention* – *energy usage measured after intervention*

Also known as Normalized Metered Energy Consumption (NMEC)
## Two Approaches: Aggregate Or Site-specific

<table>
<thead>
<tr>
<th></th>
<th>Aggregate</th>
<th>Site-specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intended for</td>
<td>Large, homogenous groups</td>
<td>More unique sites/projects</td>
</tr>
<tr>
<td>Savings claim</td>
<td>Population-level</td>
<td>Site-level</td>
</tr>
<tr>
<td>Comparison group</td>
<td>Yes</td>
<td>No (compare to own, normalized past usage)</td>
</tr>
<tr>
<td>Non-routine adjustments/</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>non-routine events (NREs)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: industrial projects limited to Strategic Energy Management (SEM) program
Use Cases

Change must be detectable at the meter
Chapter 5: Meter-Based Platform

Measurement & Verification (M&V): what’s different?

• Think about M&V at the program level
  – More detailed plan before launch
• Longer M&V period than custom
• Different calculations → different data
  – Which meters?
  – Implementation start and end dates
  – Non-routine events (NREs) – if site specific
Chapter 5: Meter-Based Platform

Process Differences – Meter-Based

**Meter-based**
- Before launch
- Implement intervention(s)
- M&V period
- Claim savings

**Custom**
- Before launch
- Implement intervention(s)
- M&V period
- Claim savings
Chapter 5: Meter-Based Platform

Key Take Aways…

• Change must be detectable at the meter
• Aggregate or site-specific
• Data collection and M&V are crucial
Meter-Based Questions?

Caroline.Francis@pge.com
Chapter 6: Financing Platform

Overview

- Platform focuses on the rules around access to On-Bill Financing (OBF)
- Not an energy savings claim methodology
- Rebate alternative
- Can also incorporate Statewide Financing Programs (CHEEF)
• Ratepayer funded revolving loan fund
• Over $120m of EE loans
• Loan term and payment set based on projected energy savings
## Financing Terms Available

<table>
<thead>
<tr>
<th>Loan Terms</th>
<th>Business</th>
<th>Government Agency and Multi-family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Loan Amount</td>
<td>$100,000 per premises</td>
<td>$250,000, per premises ($2,000,000 by exception)</td>
</tr>
<tr>
<td>Max Loan Term</td>
<td>5 Years</td>
<td>10 Years</td>
</tr>
</tbody>
</table>
Chapter 6: Financing Platform

Bill Neutrality

- Loan sized on site-specific savings
- Partial funding available
- Customers retail rate used to evaluate cost

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Project Cost for Measures</td>
<td>$90,000</td>
</tr>
<tr>
<td>Estimated Annual Energy Cost Savings</td>
<td>$21,600</td>
</tr>
<tr>
<td>Estimated Monthly Energy Cost Savings</td>
<td>$1,800</td>
</tr>
<tr>
<td>Loan Term</td>
<td>51 Months</td>
</tr>
<tr>
<td>Monthly Loan Amount (rounded down to nearest full monthly payment)</td>
<td>$1,765</td>
</tr>
</tbody>
</table>
Chapter 6: Financing Platform

Customer Eligibility

• All non-residential meters
• Customer currently receives service from PG&E at the location of retrofit project
• Customer has maintained active PG&E account for previous 24 months
• Customer must be in good credit standing with PG&E
• DA and CCA are eligible for OBF if receive a monthly bill from PG&E
Chapter 6: Financing Platform

Project Eligibility

Program: On-Bill Financing

Determine Project Eligibility

Deemed or Custom project
All projects will be eligible that are eligible for rebates

Meter Based Project
Flexibility on projects claiming meter based savings. See OBF Project Eligibility Handbook
Chapter 6: Financing Platform

OBF Loan Process

- Project Initiation
- Payment History Screening (PG&E)
- Project & QA Review
- PG&E Loan Authorization
- Installation
- Post Install & QA Review
- Loan Modification & Issue Check
- Operations
Chapter 6: Financing Platform

Cost Allocation

• Cost of 0% Ratepayer funding will be allocated for program evaluation
• Accurate annual funding forecast required by administrators to reduce funding cost allocation

<table>
<thead>
<tr>
<th>Loan Term (years)</th>
<th>OBF Costs as a % of Principal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than 4 years</td>
<td>4%</td>
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<tr>
<td>4-7 Years</td>
<td>7.5%</td>
</tr>
<tr>
<td>More Than 7 years</td>
<td>11.5%</td>
</tr>
</tbody>
</table>
Statewide Financing Programs

- Ratepayer funded
- Part of the PG&E Portfolio
- Eligible for savings claims
- Subsidized Private Capital
Chapter 6: Financing Platform

Key Take Aways…

• Financing is an alternative or compliment to rebates
• Financing may better meet the customer need
• The financing platform isn’t an energy savings claim methodology – refer to deemed, custom, and meter based
• Let us know in your bids if and how you plan to use financing

Stick around for more from David Gibbs from CAEATFA after Q&A
Financing Questions?

Peter.Thompson@pge.com
Closing

For more information:

- Visit: [https://www.pge.com/eesolicitations](https://www.pge.com/eesolicitations)

- Presentation materials will be emailed out soon
Thank You

Marcela Fox
Marcela.Fox@pge.com
APPENDIX
How 3rd Party Implementers Can Integrate CHEEF Financing into their Programs

July 2018 Implementer Outreach
We need private capital to reach our building energy efficiency goals

- There are not enough public or ratepayer $ to upgrade all of California’s buildings
- CPUC through a guidance Decision, authorized the utilities to use ratepayer funds for administration of and credit enhancement for several finance pilot programs
  - Residential, Commercial, Affordable Multi-Family, Public Building markets
  - Designed to leverage third party, private capital and bring attractive financing options to customers
- CAEATFA implementing working with the 4 Investor Owned Utilities as partners
- Financing not secured by the property
- Open market approach: multiple finance companies can participate
- On-Bill and Off-Bill repayment options
Take advantage of our financing programs to help your programs gain uptake

All measures approved for an IOU rebate or incentive program qualify. Any EE or DR measure or project that is part of your IOU approved program is eligible for our financing.

**Qualifying Projects:**
- 70% of financed amount is for energy efficiency or demand response measures
- 30% of financed amount can be non-EE improvements

- Residential
- Commercial
- Affordable Multifamily
- Public Buildings
How is CHEEF financing better than walking into a bank?

<table>
<thead>
<tr>
<th>Tangible benefits provided by lenders to borrowers in CHEEF Residential Program (REEL) due to the credit enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credit expansion</strong></td>
</tr>
<tr>
<td>FICO minimums lowered to 600*</td>
</tr>
<tr>
<td><strong>Rate reduction</strong></td>
</tr>
<tr>
<td>546 – 1097 bps</td>
</tr>
<tr>
<td>One lender lowered 1097 bps for FICO of 600</td>
</tr>
<tr>
<td><strong>Term extension (means lower monthly payments)</strong></td>
</tr>
<tr>
<td>Extended from 5 Years to up to 15 Years</td>
</tr>
<tr>
<td><strong>Amount available to borrow</strong></td>
</tr>
<tr>
<td>Raised from $10k to $50k</td>
</tr>
</tbody>
</table>

*Regional lenders lowered FICO minimums to 580
Over 200 utility customers have already used REEL, our residential financing

Lenders have financed more than $3.5 Million in REEL Loans

- **6.87%** Average interest rate
- **$17,400** Average loan size
- **52%** Homes located in LMI Census Tracts
- **242** Participating Contractors
- **7** Approved Lenders

Borrower Requirements

- Single family homes 1-4 units including townhomes, condos and manufactured homes
- Credit score minimum of 580*
- Debt to income limit of 55%

* Some lenders have their own higher minimum FICO requirements. The 2 statewide lenders require FICO minimums of 600 and 640, respectively.
CHEEF commercial financing program can help your customers complete projects with no cash outlay

Flexible options
- Up to $5MM per project
- Fast and efficient approval
- On-Bill and Off-Bill repayment options
- Microloans under $5,000 expected (CAEATFA actively recruiting a lender)

Expected benefits to customer (compared to traditional offerings)
- Broader credit approval (customers with shorter time in business or lower credit scores)
- Lower interest rates
- Longer term financing and larger amounts available

Flexible product options
- Traditional loans
- Equipment leases and finance agreements
- Service agreements
- Cash flow positive efficiency service agreements
Use CHEEF and OBF to complete the financing puzzle

Customers can use CHEEF financing when OBF doesn’t apply OR after they’ve reached the OBF limit.
Incorporate our financing offerings into your program design

- **Residential**
  - Single family residential: 1-4 Units including townhomes, condos and manufactured homes

- **Commercial**
  - Commercial customers
  - Small business
  - On-Bill option coming in 2019

- **Affordable Multi-Family**
  - Income-restricted affordable properties
  - On-Bill option coming in 2019

- **Non-Residential**
  - Public buildings
  - Large commercial
  - On-Bill repayment

Open Now

Q4 2018

Q4 2018

Spring 2019

76
Your finance and contractor partners can join our programs

Connect your program partners with the CHEEF so they can benefit:

• Featured on GoGreenFinancing.com and as part of statewide marketing campaigns
• Affiliated with a state-backed financing program
• Finance entities get access to a credit enhancement in the form of a loan loss reserve contribution for every enrolled financing
Sim Randhawa
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