



Request for Proposals

Peninsula Clean Energy, a California Joint Powers Authority, is seeking proposals from interested vendors for **Technical Assistance & Reporting Compliance for CPUC Funded Programs**

Responses are due **April 18, 2025 at 5:00pm Pacific Time.**

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1 RFP OVERVIEW

Peninsula Clean Energy Authority issues this Request for Proposals (RFP) to seek offers from qualified providers for technical support on CPUC request for energy efficiency funding through the application proceeding process and ongoing reporting & compliance assistance for current CPUC funded programs.

This RFP provides:

- general background on Peninsula Clean Energy
- description of the service sought by Peninsula Clean Energy (scope of work)
- an opportunity for Proposers to describe their qualifications and experience and explain how they can contribute to services requested.

1.1 Background

Peninsula Clean Energy (PCE) is issuing this RFP to solicit proposals for two distinct scopes of work related to its CPUC-funded energy efficiency programs:

- 1) **Technical Support Scope:** Providing technical assistance for PCE's application to administer future CPUC-funded energy efficiency programs, including program design, cost-effectiveness analysis, and preparation of all necessary application materials. This application is due in February 2026 for programs starting in January 2028. Proposers responding to this scope must provide two pricing proposals: (1) one for PCE alone and (2) one that includes both PCE and Silicon Valley Clean Energy Authority (SVCE). SVCE, a Community Choice Aggregator serving 13 cities in Santa Clara County, may participate in this scope. SVCE operates at a similar scale, with a similar territory, and faces many of the same challenges as PCE. If SVCE chooses to participate, its portfolio would closely align with PCE's, ensuring that the Consultant's efforts remain incremental rather than duplicative. The selected Consultant will contract exclusively with PCE for this engagement. For more information about SVCE, visit www.svcleanenergy.org
- 2) **Reporting and Compliance:** Supporting the reporting and compliance needs for PCE's existing CPUC-funded energy efficiency program, which will conclude in May 2025 but requires ongoing reporting and compliance support through at least 2026. PCE plans to submit an Advice Letter in Q2 2025, if approved, the program funding will extend through 2028.

Proposers may choose to respond to one or both scopes of work, and proposals will be evaluated accordingly.

This RFP supports PCE's broader objective of enhancing its capacity as an energy efficiency program administrator under the CPUC framework, leveraging the statutory right of CCAs to administer such programs under Public Utilities Code 381.1. The selected consultant(s) will play a critical role in ensuring compliance for existing programs and preparing PCE for future program administration aligned with CPUC requirements and PCE's strategic goals

2 ABOUT PENINSULA CLEAN ENERGY

Peninsula Clean Energy is the not for profit locally-led electricity provider for San Mateo County and Los Banos. Our mission is to reduce greenhouse gas emissions by expanding access to sustainable and affordable energy solutions. The agency serves over 300,000 customers by providing more than 3,500 gigawatt hours annually of electricity that is 100% carbon-free.

Since Peninsula Clean Energy launched in October 2016 customers have saved over \$100 million and over 1 million metric tons CO₂e from our electric service compared to 2016 baseline, equivalent to over 140 million gallons of gasoline use. The agency has earned investment grade credit ratings from Moody's and S&P. For more information on Peninsula Clean Energy, please go to www.peninsulacleanenergy.com.

3 RFP SCHEDULE

3.1 RFP Schedule

RFP Issued	February 28, 2025
Deadline for Questions	March 7, 2025 by 5:00 PM Pacific Time (PT)
Responses to Questions	March 14, 2025
Proposal Submission Date	April 18, 2025 by 5pm PST
Shortlist Notification	April 30, 2025
Interviews	May 7-9, 2025
Tentative award selection	May 23, 2025
Contract Execution	June 30, 2025

Question & Answer: Proposers may submit questions concerning the RFP at programsolicitations@peninsulacleanenergy.com.

4 PROPOSAL SUBMITTAL

Proposals must be received on or before the above deadline and submittal must be by email to programsolicitations@peninsulacleanenergy.com with the subject "Proposal - <Vendor Name> - ATA Technical Support".

By participating in Peninsula Clean Energy’s RFP process, a Proposer acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP instructions. Peninsula Clean Energy reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, Peninsula Clean Energy may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for Peninsula Clean Energy to enter into an agreement with any party, and Peninsula Clean Energy shall not

be bound by the terms of any offer until Peninsula Clean Energy has entered into a fully executed agreement. Only electronic submittals will be accepted.

5 CONTENT OF RESPONSE

Interested vendors must submit the following documents (except those marked “Optional”) to be considered for awarding of this proposal:

5.1 Cover Letter with the following elements (1 page)

- a) Reference to this RFP
- b) Identify which scope(s) of work the responder is bidding on (Technical Support, Reporting and Compliance, or both)
- c) Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.).
- d) Name of vendor’s representative with respect to this RFP along with telephone number and email address.
- e) A signature of an authorized individual.

5.2 Approach (6 pages maximum)

- a) Describe how you would achieve the Scope of Work described below.
- b) Provide a proposed project timeline including major milestones and deliverables.
- c) Technical approach.
- d) Key challenges and resolutions.

5.3 Budget

- a) Provide the total labor and non-labor time and materials cost for each scope being bid, as described in Detailed Project Description and Scope.
 - a. For the Technical Support Scope, provide two budgets:
 - i. one for PCE alone and
 - ii. one for PCE + SVCE.
 - b. For the Reporting and Compliance Scope, provide a separate detailed budget for PCE only for July 2025 through December 2026.

5.4 Qualifications and Experience (5 pages maximum)

Include the following:

- a) Relevant experience:

- a. Case Studies – Provide a summary of examples of similar work performed, either with regards to CPUC regulatory processes and/or energy efficiency program applications for an IOU, REN or preferably CCA.
- b) Bios or resumes of leadership team directly involved.
- c) References:
 - a. Provide contact information for three references related to similar projects, including: name, phone number, email, position and relevant project description

5.5 Certificates of Insurance for the following coverages

- a) Commercial General Liability – for bodily injury, property damage, and personal injury \$1,000,000 – each occurrence \$2,000,000 – in aggregate
- b) Business Automobile Liability – “any auto” (Company Vehicles) – At least \$1,000,000
- c) Personal Automobile Liability – “any auto” (Personal Vehicles) – At least \$500,000
- d) Worker’s Compensation and Employer’s Liability (EPL)– injury or death, each accident at least \$1,000,000 (EPL not required for Sole Proprietor)

5.6 Supplier Diversity Questionnaire (Optional)

Peninsula Clean Energy’s Supplier Diversity Questionnaire can be downloaded at: <https://www.peninsulacleanenergy.com/wp-content/uploads/2023/06/Supplier-Diversity-Questionnaire-V4.docx> Please note, your response (or lack thereof) will have no impact on your contract status or eligibility to work with Peninsula Clean Energy in accordance with state law.

6 REVIEW AND SELECTION PROCESS

Evaluation will be based on a combination of quantitative and qualitative criteria. Peninsula Clean Energy will evaluate each Offer against these criteria and select a subset of Offers to move to the Shortlist phase. The most qualified individual or firm will be recommended by the RFP Evaluation Committee based on the overall strength of each proposal, and is not restricted to considerations of any single factor such as cost. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

1. Qualifications and experience of the entity, including capability and experience of key personnel and experience with other public and/or private agencies to provide these services
2. History of successfully performing services for public and/or private agencies and other CCA's
3. Completeness of the proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
4. Ability to meet any required timelines or other requirements
5. Existence of and circumstances surrounding any claims and violations against you or your organization
6. Cost to Peninsula Clean Energy for the primary services described by this RFP
7. References

7 AGREEMENT TERMS

Awardees will be required to enter into a contract using Peninsula Clean Energy's standard contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by Peninsula Clean Energy but are not guaranteed to be accepted. Rejection of the final terms from Peninsula Clean Energy is grounds for disqualification. Shortlisted participants will be required to provide any redlines to the standard terms ahead of the interview phase.

Peninsula Clean Energy's standard contract terms are available for review here:
<https://www.peninsulacleanenergy.com/contracts/>

8 INCLUSION OF NON-PARTICIPATING AGENCIES

PCE is asking all responding vendors to indicate their willingness to extend the terms of resulting contracts, inclusive of price, to other interested California-based municipalities, municipally-owned utilities and community choice energy programs. While this clause in no way commits these agencies to contract with PCE's awarded consultant, nor does it guarantee any additional orders will result, it does allow other agencies, at their discretion, to make use of PCE's competitive process (provided said process satisfies their own procurement guidelines) and purchase directly from the awarded contractor. All purchases made by other agencies shall be understood to be transactions between that agency and the awarded vendor; PCE shall not be responsible for any such purchases.

9 SUPPLIER DIVERSITY

Consistent with its strategic goals, Peninsula Clean Energy has a strong commitment to foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves. As part of that goal, Peninsula Clean Energy strives to ensure its use of vendors and suppliers who share its commitment to sustainable business and inclusionary practices.

To help ensure an inclusive set of vendors and suppliers, Peninsula Clean Energy's policy requires it to:

1. Strive to use local businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from local businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and
3. Engage in efforts to reach diverse communities to ensure an inclusive pool of potential suppliers.

General Order 156 (GO 156) is a California Public Utilities Commission ruling that asks utility entities to set a goal to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' (WMDVLGBTBEs) in all categories. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Clearinghouse database.

The CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com. Peninsula Clean Energy's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), and lesbian, gay, bisexual, or transgender people (LGBTBE).

As a public agency and consistent with state law, Peninsula Clean Energy will not use any such provided information in any part of its decision-making or selection process. Rather, Peninsula Clean Energy will use that information solely to help evaluate how well it is conforming to its own policies and goals. Pursuant to California Proposition 209, Peninsula Clean Energy does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

10 PENINSULA CLEAN ENERGY LEGAL OBLIGATIONS

Peninsula Clean Energy is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that Peninsula Clean Energy is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. Peninsula Clean Energy acknowledges that another party may submit information to Peninsula Clean Energy that the other party considers confidential, proprietary, or trade secret information pursuant to the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255) (“Confidential Information”). Any such other party acknowledges that Peninsula Clean Energy may submit to the other party Confidential Information. Upon request or demand of any third person or entity not a party to this RFP (“Requestor”) for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information (“Disclosing Party”), the party receiving such information (“Receiving Party”), as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address or email address listed on the cover page of the RFP. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

11 GENERAL TERMS AND CONDITIONS

1. **Peninsula Clean Energy's Reserved Rights:** Peninsula Clean Energy may, at its sole discretion: withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.
2. **Public Records:** All documents submitted in response to this RFP will become the property of Peninsula Clean Energy upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. **No Guarantee of Contract:** Peninsula Clean Energy makes no guarantee that a contractor and/or firm added to the qualified vendor list will result in a contract.
4. **Response is Genuine:** By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.

12 DETAILED PROJECT DESCRIPTION AND SCOPE

12.1 Overview

Peninsula Clean Energy (PCE) is seeking a qualified consultant to support two key initiatives: (1) the application to administer energy efficiency programs under Public Utilities (PU) Code 381.1 and (2) ongoing reporting and compliance for an existing CPUC-funded energy efficiency program

12.1.1 Technical Assistance Overview

The consultant will assist PCE in designing its energy efficiency portfolio for the upcoming CPUC application. This includes program design, cost-effectiveness modeling, and ensuring the accurate preparation of all required tables and metrics for application appendices.

PCE is committed to delivering a targeted portfolio of energy efficiency programs that maximize cost-effectiveness, greenhouse gas (GHG) reductions, and equity benefits to underserved communities. The selected consultant will work closely with PCE staff and stakeholders to prepare and design a portfolio that aligns with CPUC requirements and meets PCE's strategic objectives.

PCE has assembled a team of subject matter experts, regulatory and legal advisors, and project management professionals to lead the development of the Application and guide the strategic direction. This engagement requires deep expertise in CPUC regulatory processes, cost-effectiveness modeling, and energy efficiency program design. The consultant must be capable of providing ongoing technical assistance throughout the application process, refining program strategies based on PCE's and other stakeholder feedback, and ensuring compliance with all applicable policies and guidelines.

The Application

PCE is planning for an application submission to the CPUC in February 2026 that will include two key components: the Application and the Testimony. The Application serves as a high-level summary outlining the main policy requests that support Peninsula Clean Energy's (PCE) energy efficiency (EE) funding request. The Testimony provides the core documentation that establishes the factual foundation for PCE's request and is structured into three main sections.

First, Exhibit 1 is the Energy Efficiency Business Plan (2028–2035) and will define PCE's long-term vision for EE, detailing:

- PCE's vision for EE
- Budget
- Policy Recommendations

Second, Exhibit 2 is the Energy Efficiency Portfolio Plan (2028–2031) will provide a comprehensive framework for PCE's EE initiatives, including:

- Forecast Methodology
- Segmentation Strategy
- Sector Strategy
- Portfolio Management
- Evaluation, Measurement and Verification
- Cost & Cost Recovery

Third, additional supporting documentation will be included in the Exhibit 3 Appendices, which will provide:

- Budget Details (potentially subject to revision by the Energy Division).
- Metrics

Attachment B is included in the RFP package and contains the full application template with more detailed information than described above.

Together, these components will provide a comprehensive and data-driven justification for PCE's EE funding request, ensuring alignment with regulatory requirements and strategic goals.

The consultant will be responsible for providing program summaries and technical expertise, as well as developing and supporting metrics and tables within the Portfolio and Business Plan Testimony Exhibits, specifically related to the technical work completed in the appendices. However, the drafting and content development of these plans will remain the responsibility of PCE project staff.

Data Provided to Consultant

Market research is in progress by the PCE team to inform the consultant's technical support for program development. Below is a list of metrics that the consultant will have access to for the Technical Assistance SOW.

1. Geographic Service Area Information

- Identify the counties, cities, and regions covered by PCE.
- Include any recent expansions or changes to the service area.
- Distribution of urban, suburban, and rural areas.
- Information on population density and employment hubs.
- Existence of disadvantaged communities (DACs) per CES 4.0

2. Climate and Environmental Context

- Local climate zones and trends (e.g., increases in cooling or heating degree days).
- Fire risk areas, if applicable, including maps or data on High Fire Threat Districts.
- Vulnerability to other climate impacts such as winter storms, flooding or extreme heat.
- Outage data (i.e., how many outages has a customer experienced and how long were the outages)?

3. Customer Profile

- Total number and percentage of service accounts per
 - I. Customer type (residential vs non-residential)
 - II. Sector (per rate class) (residential, commercial, industrial, agricultural etc.).
- Residential customer details
 - I. Number and percentage of homes that are single family vs. multi-family
 - II. Number and percentage of homes that are owner-occupied versus renter-occupied.
- Commercial customer details
 - I. Number and percentage of small and medium businesses (SMB) vs large businesses

4. Customer Demographics and Equity Metrics

- Language & Heritage
 - I. Percent of residents born outside the U.S.
 - II. Major ethnic groups within the service area.
 - III. Primary languages spoken other than English and their distribution.
- Income
 - I. Median household income
 - II. Percentages of households under different income brackets (e.g., <\$50K, \$50K–\$100K, etc.).
 - III. Data on income disparities (e.g., comparing top and bottom census tracts)
- DACs
 - I. Number and percentage of residential customers in DACs
 - II. Number and percentage of SMBs in DACs
- Energy Usage Patterns
 - I. Total energy consumption and percentage/ share of energy consumption by customer type (residential vs. non-residential)
 - II. Total energy consumption and percentage/ share of energy consumption by sector (residential, commercial, agricultural, industrial).
 - III. Peak demand – for PCE as a whole, by customer type (resi vs non-res) and sector

5. Existing programs

- List of existing programs in the PCE territory

12.1.2 Reporting and Compliance Overview

For the Reporting and Compliance scope, the consultant will provide essential reporting compliance support for PCE's existing CPUC-funded energy efficiency program. Reporting support will be required at least through Q2 2026. However, PCE plans to submit an Advice Letter in Q2 2025. Once approved, the program will receive funding through 2028.

This program follows a Population-Level Normalized Metered Energy Consumption (NMEC) approach, meaning all claims are submitted at the population level. The consultant will support program implementers in submitting claims through the California Energy Data and Reporting System (CEDARS) and ensure compliance with all reporting requirements.

CPUC reporting requirements include:

- Monthly Budget Reports

- Quarterly Reports,
- Annual Reports & Savings Claims
- Annual True-Up Savings Claims (specific to NMEC programs)

The consultant’s expertise in NMEC reporting and familiarity with CPUC compliance requirements will be essential in ensuring accurate, timely, and successful submissions throughout the program’s duration.

12.2 Scope of Work

These scopes of work are to be used as a general guide and is not intended to be a complete list of all work associated with this project. Proposers may suggest alternative approaches that will support the intent of the project and result in similar deliverables. PCE reserves the right to revise or remove tasks based on recommended approaches presented in proposals.

12.2.1 Technical Assistance

The selected consultant will be responsible for providing, at a minimum, the following services:

1. PCE Coordination

1.1. Monthly invoicing

The consultant will develop an invoice template for PCE approval and will submit said invoice to PCE monthly by the 10th of the month for the previous month.

Task 1.1 Deliverable: Monthly Invoice

1.2. Kick off Meeting and Check-in Meetings

Consultant will develop an agenda and lead a program kickoff meeting with PCE to review program goals and objectives, budget, timeline, and administrative processes at a mutually determined date following contract execution.

After the kickoff meeting, the Consultant will set up check-in meetings on a biweekly recurring schedule for the duration of the period of performance, unless more frequent meetings are necessary as determined by PCE. For check-in meetings, Consultant will work with the PCE contract administrator(s) to determine the agenda at minimum one day prior to the meeting. Meetings will focus on program progress updates, reviewing deliverables, and determining expected milestones for the next meeting.

Task 1.2 Deliverable: Meeting agendas and meeting minutes

2. Project Plan

2.1. Develop Project Plan

The consultant will furnish a detailed project plan outlining the approach and key milestones to deliver tasks 3.1. and 3.2, at a mutually determined date following contract execution.

The deliverables will be reviewed by PCE and consultant will be responsible for revising the deliverables in accordance with PCE direction and gain approval of the final draft by PCE.

Task 2.1 Deliverables:

- *Draft Project Plan*
- *Final Project Plan*

3. Technical Assistance

3.1. Application Portfolio Development

Technical support for Business Plan/Portfolio Plan Development, Program Design, and Cost-effectiveness analysis including but not limited to:

- Supporting portfolio design based on PCE’s direction and goals
- Proposing cost-effective measure mixes
- Supporting graphics and visuals for Testimony Exhibits 1,2, & 3
- Metrics and Application Workbook
- Cost Effectiveness Tool (CET) runs
- Consult with PCE project team subject matter expert as necessary

The deliverables will be reviewed by PCE, and the consultant will be responsible for revising the deliverables in accordance with PCE’s direction and producing the final draft. The final set of deliverables will be determined as the application process develops.

Task 3.1 Deliverables:

- *Initial draft of Exhibit 3, application workbook and Metrics*
- *Final draft of Exhibit 3, application workbook and Metrics*
- *Final supporting visuals and tables for Exhibits 1 & 2*

3.2. Program Summaries

Develop and finalize program summaries and program cards (refer to Attachment B for program card template and details, subject to change by CPUC direction) for the final portfolio of programs to be included in Exhibit 2 of the application.

The deliverables will be reviewed by PCE and the consultant will be responsible for revising the deliverables in accordance with PCE direction and produce the final draft.

Task 3.2 Deliverables:

- *Draft Program Summaries for Exhibit 2*
- *Finalize Program Summaries for Exhibit 2*
- *Draft Program Cards*
- *Final Program Cards*

12.2.2 Reporting and Compliance Support

1. CPUC Reporting

1.1. Conduct CPUC compliance reporting for **one** energy efficiency program, including but not limited to the following:

- Work closely with program implementer to ensure they understand and correctly provide data to the Consultant as required by CPUC reporting guidance
- Submit monthly, quarterly, and annual CPUC reporting through the California Energy Data and Reporting System (CEDARS)
- Verify the accuracy of submitted claims and ensure compliance with CPUC requirements.
- Assist in resolving discrepancies and coordinating necessary corrections with program implementer.
- Support CPUC data requests and metrics reporting
- Miscellaneous reporting tasks as identified by PCE staff
- Develop and maintain a reporting Standard Operating Procedure (SOP) document.

Task 1.1 Deliverable

- *Draft initial SOP*
- *Finalize initial SOP*

2. Regulatory Compliance Support

2.1 Provide regulatory support and guidance on reporting compliance for **one** CPUC-funded energy efficiency program, including but not limited to:

- Attend CPUC and relevant stakeholder meetings and workshops (as needed)
- Convey/advocate solutions that serve the best interests of Peninsula Clean Energy
- Monitor and communicate relevant reporting guidance directives, and proceedings from the CPUC to ensure implementers and PCE remain informed and compliant with CPUC reporting requirements.

3. General Administrative Support and Miscellaneous Tasks

3.1. Provide support for administrative activities that may not fall under tasks above but are necessary to support PCE with CPUC regulatory compliance. These tasks could include, but are not limited to, creating a detailed report of monthly activities, scheduling meetings, preparing and maintaining documentation, managing communication with stakeholders, and research and analysis.