

## CPUC Staff Ex Ante Review

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| CPUC Staff Project ID Number                     | PGE_24_T_R_957_PRJ - 03909516_WholeBldg  |
| CMPA Directory Link                              | <a href="https://deeresources.info/cmpa/projects/21400">https://deeresources.info/cmpa/projects/21400</a>  |
| PA   | PGE  |
| PA Application ID                                | PRJ - 03909516   |
| PA Application Executed Date                     |  |
| PA Program ID                                    | SW_NC_NonRes_Res_mixed   |
| PA Program Name                                  | California Design Assistance CEDA MF Res-Mixed   |
| PA Program Year                                  |  |
| Date of CPUC Staff Review:                       | 11/25/2024   |
| PA CMPA Upload Dates Included in this review:    |  |
| First PA Upload                                  | 10/15/2024   |
| Second PA Upload                                 | N/A  |
| Third PA Upload                                  | N/A  |
| Fourth PA Upload                                 |  |
| Fifth PA Upload                                  |  |
| Sixth PA Upload                                  |  |
| Seventh PA Upload                                |  |
| Eighth PA Upload                                 |  |
| PA Measure Description(s):                       |  |
| Measure 1  | INTEGRATED BUILDING-NONRES-WHOLE BUILDING APPROACH   |
| Measure 2  |  |
| Measure 3  |  |
| Measure 4  |  |
| Measure 5  |  |
| Measure 6  |  |
| Measure 7  |  |
| Measure 8  |  |
| Measure 9  |  |
| Measure 10                                       |  |
| PA Project Description:                          | The proposed project is a new 7-story 230000 sq ft multi-family facility that is one of 2 buildings for this location in [REDACTED]. This project will be one of the first in [REDACTED] portfolio of projects that has marketable sustainability features in its overall design as well as in the individual apartments. The project is targeting all-electric HVAC systems but will retain the use of gas service water heating systems. |
| Bi-Monthly Upload kW Demand Reduction            | 14.4   |
| Bi-Monthly Upload Annual kWh Impacts             | 72,821.0   |
| Bi-Monthly Upload Therm Impacts                  | 3,696.0  |
| PA Proposed Incentive \$ (to Customer)           | \$13,136.60  |
| Project Documentation kW Demand Reduction        | 14.6   |
| Project Documentation Annual kWh Impacts         | 72,821.0   |
| Project Documentation Annual Therm Impacts       | 3,696.0  |
| Project Documentation Incentive \$ (to Customer) | 33,624.0   |
| CPUC Staff Primary Reviewer Name                 | [REDACTED]   |
| CPUC Staff Primary Reviewer Firm                 | DNV  |
| CPUC Staff Review Supervisor Name                | [REDACTED]   |
| CPUC Staff Review Supervisor Firm                | DNV  |
| PA Primary Reviewer Name                         |  |
| PA Primary Reviewer Firm                         |  |
| CPUC Staff Project Manager                       |  |
| CPUC Staff Policy Authorization (as needed)      |  |
| CPUC Staff Recommendation:                       | Advisory   |
| For rejection, action required:                  | N/A  |
| M&V Review:                                      | Post M&V Review NOT Required   |

| Action Number: | Summary of CPUC Staff Required Action by the PA: | Action Category | PA Response | ED Resolution |
|----------------|--|-----------------|-------------|---------------|
|                |  |                 |             |               |

| Note or Instruction Number: | CPUC Staff Notes or Instructions:  | Instruction Category  | PA Response | ED Resolution |
|-----------------------------|--|-----------------------|-------------|---------------|
| 1                           | Please correct the incentive amount in bimonthly upload data to reflect the \$33,624 incentive evident in the most recent project documentation.   | Incentive calculation |             |               |
| 2                           | PFS page 15 states that "Cost estimates noted here and in Section 4.1 align with Method 4 in the Statewide Custom Project Guidance Document, using industry sources such as RS Means to estimate cost adds for the proposed equipment and measures." The Statwide Custom Project Guidance Document requires for Method 4 that "costs and assumptions should be tracked in a spreadsheet. If necessary, the methodology may be documented in a separate document." However, the submittal did not include supporting detail on the underlying assumptions or methodology. | Measure cost          |             |               |
|                             |  |                       |             |               |
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| CPUC Staff Recommendation Definitions                           |  |
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| CPUC Staff Recommendation                                       | Definition   |
| <b>Application ready to proceed without exception</b>           | The PA will continue to upload application documents to the CMPA directory through the implementation and claims phases of the project. The PA may proceed to approve the project without waiting for CPUC Staff response. A project is waived from further review at the post-installation stage by CPUC staff, but the PA is responsible for post-installation (IR) review. There will not be conditional approval.  |
| <b>Application ready to proceed with exception(s), as noted</b> | <p>The PA must make revisions or changes as noted in CPUC Staff's review comments before signed agreement with customer. The PA will continue to upload application documents to the CMPA directory through the implementation and claims phases of the project. The PA may proceed to approve the project without waiting for CPUC Staff response. If CPUC Staff decides to perform IR review of a project, CPUC Staff will notify the PA. The scope will be limited to determine if the project was carried out consistent with the application and notes provided during pre-installation review and to obtain information pertaining to whether the eligibility criteria or metrics should be revised.</p> <p>Unless the scope of work presented in project application has changed at IR review, the project will not be reviewed again in the areas specified below. Scope change is defined by substantial changes include significant modifications to the proposed equipment type, size, quantity, configuration, the expansion of a project to include additional retrofits, or the splitting of a project into multiple phases.</p> <p>The following areas will not be reviewed again by CPUC Staff:</p> <ul style="list-style-type: none"> <li>• Calculation Tool</li> <li>• Calculation Methodology</li> <li>• M&amp;V Plan</li> <li>• Baseline</li> <li>• Eligibility</li> <li>• EUL/RUL</li> <li>• Measure Type</li> <li>• Program Influence</li> </ul> |
| <b>Application rejected.</b>                                    | <p>The application is rejected as submitted. The PA shall promptly inform the applicant as to the reasons why the project was rejected and the specific recommendations for the conditions under which the project would be approved. CPUC Staff shall provide the reasons for the rejection or request for modification, including each basis as to why the project is rejected, or modification is requested. In addition, CPUC Staff shall provide specific recommendations for the conditions under which the project would be approved.</p> <p>If any party to the project is unsatisfied with the Commission's directions for the project, a dispute resolution process may be initiated by that party. The Commission shall adopt rules for the conduct of the dispute resolution process. – Section 381.2 (g) (3) (F)</p>  |
| <b>Advisory.</b>  | The PA is not formally required to follow instructions or recommendations given in an Advisory review. However, issues found will affect ESPI scoring and may come up again in Ex-Post review.   |