

DOCKETED

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Project Title:	Energy Efficiency Program Data Collection from Non-Utility PACE Programs - Annual Reporting
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Document Title:	Instructions for Completing CEC PACE Form 1312
Description:	Instructions for completing CEC PACE Form 1312
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Form CEC-1312 – Energy Efficiency Program Data Collection from Non-Utility PACE Programs (Revised Nov. 2022)

Purpose: This form provides annual information about energy efficiency programs for the previous fiscal year by non-utility PACE (Property Assessed Clean Energy) program administrators.

The information required to be reported to the CEC by PACE program administrators includes: the program name, sector, project ID, assessor's parcel number (APN), project address, project start date, project completion date, measure types, renewable energy (self-generation) indicator.

This information contributes to the California Energy Commission's staff analyses for the *Energy Efficiency Action Plan* and Senate Bill 350 – the Clean Energy and Pollution and Reduction Act (De León, Chapter 547, statutes of 2015) tracking progress reports.

Authority: California Code of Regulations, title 20, section 1312.

Who must file: Each PACE program administrator doing business in California, inclusive of commercial and residential programs, as well as private and public agency-run programs.

When to file: Reports are due for each PACE program administrator's most recently completed fiscal year on January 15, 2023 (extended from September 15, 2022). In 2023 and all subsequent reporting years, reports will be due by September 15.

How to file: Reports in electronic file format may be submitted by email to PACE@energy.ca.gov. Each submittal must be accompanied with a declaration statement. A sample declaration statement is included with the form CEC-1312. If a filer believes its report may contain confidential information, the filer shall follow the steps in the **Confidentiality** section of these instructions to electronically file an Application for Confidential Designation that specifies which portions of the report shall designated a confidential record and not publicly disclosed by the CEC.

Confidentiality: The CEC will consider reports to be public records unless they are transmitted with Application for Confidential Designation as described in this section. To apply for confidentiality, a filer must first complete a [CEC-13 form](#) to specify which parts of the report are confidential and why. The CEC-13 and the CEC-1312 form containing annual PACE data must be uploaded directly to the Docket Unit through the [confidential e-filing system](#), following the instructions for "Existing Proceedings" listed in the CEC-13 form. You must select and submit the confidential e-filing, containing the CEC-13 and CEC-1312 forms, to **Docket No. 22-DATA-01** for the CEC to consider your report timely and complete. If it is your first time using the CEC's e-filing system, you will first be prompted to [register a new account](#).

For what period: Under the reporting requirements, each PACE program administrator shall report to the CEC on annual investments in energy efficiency programs for the **previous fiscal year**. The CEC recognizes that different PACE program administrators may operate on different fiscal year calendars. Accordingly, we

ask that you report for your organization's most recently completed fiscal year and list the start and end dates for the period your report covers. For example, if your fiscal year concludes on December 31, 2022, the report submitted on January 15, 2023 should cover up to this date, but if your fiscal year concluded on June 30, 2022, your report should only cover up to that date.

Where to file: California Energy Commission
Attn: Cynthia Rogers
Email: PACE@energy.ca.gov
Or through the [CEC's confidential e-filing system](#) (reference Docket No. 22-DATA-01)

Form CEC-1312 Instructions

- 1) **Program name:** title or name of the PACE program (e.g., "CaliforniaFIRST");
- 2) **Sector Indicator:** the sector(s) that the program targets ("R" for residential and "NR" for non-residential);
- 3) **Building Type*:** please include building type information such as single family, multi-family (three stories or higher), office, or hotel for example. Please add as much detail as possible.
- 4) **Project ID:** a unique ID for each project implemented under the program;
- 5) **Assessor's parcel number (APN):** the county name and assessor's parcel number (APN) of the site at which the project was implemented;
- 6) **Project Address:** street address of the PACE project;
- 7) **Project Start Date:** the date the project implementation was started in the mm/dd/yyyy format;
- 8) **Project Completion Date:** the date the project implementation was completed in the mm/dd/yyyy format. Please leave blank if the project has not been completed.
- 9) **Measure Types:** list the efficiency measure implemented, including but not limited to a) Lighting, b) Heating, Ventilation, and Air Conditioning (HVAC), c) Domestic Hot water, d) Enclosure (e.g., walls, windows, roof), and e) Self-Generation including rooftop PV;
- 10) **Measure Specifications*:** please include technology type, fuel type, annual energy savings, and cost data if possible. For example, under HVAC please indicate whether electric heat pump, gas furnace, or other systems were installed. Please also include any non-efficiency upgrades or any measures that may have increased net energy use, such as an expansion in building footprint or retrofit intended to bring a vacant building back into productive use. Please add as much detail as possible.
- 11) **Renewable Energy (Self-Generation) Indicator:** indicate whether the project included investments in self-generation projects and the type of self-generation

project, including system size and whether the project includes battery storage. Please add as much detail as possible.

*Numbers 3 and 10 are optional fields and are not required by the regulation but by providing this information on the form will help CEC staff analyses for both the SB 350 tracking progress reports and the *Energy Efficiency Action Plan*.