

April 6, 2017

CA Public Utilities Commission  
Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue, 4<sup>th</sup> Floor  
San Francisco, CA 94102-3298



**Advice Letter 23-E**

**Re: Identification of Metrics to Track Marin Clean Energy’s Low Income Families and Tenants Pilot**

Pursuant to Decision (“D.”) 16-11-022, Ordering Paragraph (“OP”) 147, *Decision on Large Investor-Owned Utilities’ California Alternative Rates for Energy (CARE) and Energy Savings Assistance (ESA) Program Applications*, Marin Clean Energy (“MCE”) submits Advice Letter (“AL”) 23-E to identify the metrics MCE will track in implementation of its Low Income Families and Tenants (“LIFT”) pilot.<sup>1</sup>

**Effective Date:** May 6, 2017

**Tier Designation:** Pursuant to General Order (“GO”) 96-B, Energy Industry Rule 5.2, this filing has a Tier 2 designation.

**Purpose**

Pursuant to OP 147 of D.16-11-022, this filing provides the metrics MCE will track in implementation of its LIFT pilot.<sup>2</sup> This filing also advises the California Public Utilities Commission (“Commission”) staff of revisions MCE made to the pilot’s targets and budget to accommodate the \$1.1 million reduction in MCE’s proposed pilot budget ordered in D.16-11-022.<sup>3</sup>

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<sup>1</sup> D.16-11-022, OP 147 at 492.

<sup>2</sup> *Id.*

<sup>3</sup> MCE originally proposed a LIFT pilot budget of \$4.6 million. Testimony of Marin Clean Energy Regarding a Proposed Low-Income Energy Efficiency Pilot Program for the Program Years 2015-2017, April 27, 2015 (“MCE Testimony”), Exhibit C at 5. The Commission approved a number of MCE’s LIFT pilot elements, but approved only \$3.5 million of MCE’s proposed \$4.6 million budget. D.16-11-022, OP 147 at 492.

## **Background**

### **a. MCE's LIFT Pilot**

MCE proposed its LIFT pilot in April 2015.<sup>4</sup> The LIFT pilot program seeks to test strategies to provide energy efficiency (“EE”) services, education, and energy savings incentives to low-income single family and multifamily homes unserved or underserved by the Energy Savings Assistance (“ESA”) program and existing EE programs.<sup>5</sup>

In D.16-11-022, the Commission approved a number of MCE's proposed LIFT pilot elements. For the pilot's single family component, the Commission approved and encouraged MCE's proposed mobile, app-based tool and the Matched Energy Savings Account (“MESA”).<sup>6</sup> For the pilot's multifamily component, the Commission approved: (1) MCE's proposed heat pump installation measure; (2) its proposal for energy education workshops; (3) the proposal to leverage MCE's general EE program; (4) MCE's use of Community Based Organizations (“CBOs”) to identify and reach potential program participants; and (5) MCE's leveraging of its On-bill Repayment (“OBR”) program.<sup>7</sup> The LIFT pilot will implement each of the foregoing program elements with the exception of the OBR program.<sup>8</sup>

To accommodate the LIFT pilot's lower authorized budget, MCE revised the pilot's allocated budget and targets.<sup>9</sup> MCE preserved the original LIFT pilot design. To address the reduction in budget, MCE accordingly decreased the targeted number of units served under the program, which results in less anticipated energy savings. MCE also reduced the single family energy savings projections per household to be more aligned with the Low Income Needs Assessment (“LINA”) study, but doubled the program participant target and thus expects to achieve more energy savings than previously anticipated for that element. Table 1 below compares MCE's revised budget and savings targets with MCE's originally proposed targets.<sup>10</sup>

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<sup>4</sup> See MCE Testimony.

<sup>5</sup> MCE Testimony, Exhibit C at 8.

<sup>6</sup> D.16-11-022 at 388.

<sup>7</sup> *Id.* at 387-88.

<sup>8</sup> MCE intends to discontinue the OBR program as part of MCE's general EE multifamily program offerings. As such, MCE removed the OBR leveraging as an element of its LIFT pilot. MCE will file a subsequent AL to request approval for the OBR cancellation in accordance with the Commission's rules.

<sup>9</sup> See Footnote 3, above; *see also* D.16-11-022, OP 147 at 492.

<sup>10</sup> See MCE Testimony, Exhibit C at 5-6 for MCE's originally proposed budget allocation and targets.

**Table 1: Revised Budget, Targets, and Savings<sup>11</sup>**

Sector	Requested Budget	Approved Budget	kWh	Revised kWh	Therms	Revised Therms	Units	Revised Units
Multifamily	\$3,770,358	\$2,713,732	568,105	232,979	27,170	15,368	2,470	1,482
Single family	\$846,324	\$646,268	23,831	46,800	2,371	4,800	300	600
<b>Total</b>	<b>\$4,616,682</b>	<b>\$3,500,000<sup>12</sup></b>	<b>595,275</b>	<b>279,779</b>	<b>26,202</b>	<b>20,168</b>	<b>2,770</b>	<b>2,082</b>

**The LIFT Pilot Metrics**

**a. The Commission Ordered MCE to Identify Additional Metrics to Track the LIFT Pilot.**

The Commission ordered MCE to file an AL to identify “a more robust set of key metrics for program tracking.”<sup>13</sup> Specifically, the Commission sought additional metrics to track and evaluate the LIFT pilot’s leveraging efforts with the general EE program and metrics to ensure that the LIFT pilot achieves energy savings and supports the health, safety, and comfort of the served communities.<sup>14</sup> This AL presents MCE’s revised metrics to comply with the Commission’s directive.

MCE followed the program performance metrics guidance in the general EE proceeding to develop the LIFT pilot metrics.<sup>15</sup> Specifically, MCE followed the guidance provided in Appendix 2 to D.09-09-047, which describes the conventions to develop program performance metrics<sup>16</sup> and the metrics framework for the Rolling Portfolio process in R.13-11-005. The resulting LIFT pilot metrics aim to capture lessons learned from the pilot’s offerings for both multifamily and single family customers to inform the pilot’s implementation and future programs beyond this pilot.

Attachments 1 and 2 to this AL present MCE’s metrics within barriers and metrics tables. These tables are intended to (1) present a summary of the proposed program intervention strategies, (2) connect the strategies to the problem statements and market barriers that the intervention strategies are intended to resolve, and (3) articulate metrics that will track the success of the intervention strategies. The tables include metric baselines<sup>17</sup> and short and long-term targets to facilitate evaluation and reporting.

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<sup>11</sup> MCE developed these savings and targets based on its experience administering its general EE portfolio.

<sup>12</sup> The \$3.5 million approved pilot budget includes \$140,000 for Evaluation Measurement and Verification (“EM&V”) funding.

<sup>13</sup> D.16-11-022 at 389; *see also* OP 147 at 492.

<sup>14</sup> D.16-11-022 at 389-90.

<sup>15</sup> *See id.* at 390.

<sup>16</sup> *See* D.09-09-047, Appendix 2.

<sup>17</sup> For both the single family and multifamily metrics, MCE will use Program Year 1 as the baseline. The LIFT pilot is attempting new strategies to identify and reach communities that are

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## **b. The LIFT Pilot’s Single Family Component and Metrics**

### **i. General Description of the Single Family Elements**

The LIFT pilot’s single family component addresses the information and financial barriers that inhibit low-income individuals from participating in EE programs. To address these barriers, the LIFT pilot will test a mobile, app-based behavioral and information tool to facilitate participants’ access to information about opportunities for low- and no-cost energy savings strategies. The pilot focuses on mobile phone technology to encourage program participation in low-income communities with access to internet-connected mobile technology, but that may lack internet access via home computers. To supplement the app-based tool, MCE will also provide education programs to inform customers of low- or no-cost energy savings strategies and financing options.

Additionally, MCE will pilot the MESA to test strategies to reduce the financial barriers to EE participation. The MESA will enable program participants to apply the accrued monetary savings from any energy savings actions taken to invest in additional energy savings opportunities. To accomplish this, MCE will match customer bill savings on a 2:1 basis. Program participants can then use the monetary savings to invest in additional energy savings measures. The MESA program is intended to reinforce energy savings activity leading to greater persistence of savings and a desire for energy-efficient products.

### **ii. The Single Family Metrics**

MCE’s metrics for the mobile, app-based tool will utilize the tool’s analytics to track the efficacy and usefulness of the tool from the user’s perspective. Metrics will capture: (1) the number of mobile app users; (2) the number of times individual customers interact with the app; and (3) the level of customer satisfaction with the app, which will be based on the results of a customer survey. Separately, metrics will track the MESA participation level, which includes tracking the amount of money distributed to participants through the MESA.

MCE presents its proposed LIFT pilot metrics for the single family component as Attachment 1.

## **c. The LIFT Pilot’s Multifamily Component and Metrics**

### **i. General Description of the Multifamily Elements**

The LIFT pilot’s multifamily component comprises the majority of the pilot’s budget and activity.<sup>18</sup> The multifamily component seeks to reduce multifamily landlords’ and tenants’ apprehensions about EE program participation. These apprehensions result in avoidance of EE program engagement and “hidden communities” of customers. The term “hidden communities” refers to those customers that are reluctant to participate in general EE and ESA programs because

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not currently being reached, so past program years’ data collections are not particularly useful for the purpose of evaluating this pilot.

<sup>18</sup> As presented in Table 1, above, the multifamily component comprises \$2,713,732 of the pilot’s \$3.5 million authorized budget.

of real or perceived negative consequences. These consequences may include enforcement actions against landlords for existing health and safety code violations, landlord retaliation against tenants for exposing code violations, potential immigration enforcement actions (even though citizenship verification is not part of program delivery), and general concern about privacy infringement. By tailoring the pilot to identify and reach these hidden communities, MCE hopes to better serve those customers and achieve additional energy savings.

The multifamily component will also test outreach and education strategies to combine ESA program and other low income program offerings with energy savings opportunities from MCE's general EE program.<sup>19</sup> Coordinating the general EE programs with ESA will facilitate efficient and comprehensive delivery of EE services to low-income residents and property owners, particularly members of "hidden communities". MCE will leverage existing health and safety and EE programs to bring comprehensive EE upgrades to income qualified multifamily landlords and tenants. Additionally, for multifamily properties, MCE will pilot a fuel switching measure to install heat pumps where safe and cost-effective to replace unsafe combustion appliances and reduce greenhouse gas ("GHG") emissions.<sup>20</sup> MCE will work closely with CBOs and trusted messengers<sup>21</sup> to educate landlords and tenants about the benefits of pilot participation and encourage on-going participation in EE programs.

## **ii. The Multifamily Metrics**

In addition to the energy savings targets provided in Table 1, above, MCE provides specific multifamily metrics to track the LIFT pilot's success in: (1) reducing landlord and tenant apprehensions about EE program participation; (2) identifying and reaching "hidden communities"; (3) extending existing EE programs and comprehensive EE upgrades to low-income communities; and (4) incentivizing uptake of fuel-switching opportunities where safe and cost-effective.

In general, the evaluation of the LIFT pilot will rely on pre- and post-project surveys and program tracking data. The metrics include: (1) the percentage of participating housing units that have not previously participated in EE programs because of a lack of access to health and safety resources;

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<sup>19</sup> The LIFT pilot program will offer all measures available to market-rate properties that are available through MCE's Multifamily Energy Savings Program. There will also be additional funding for in-unit measures and health and safety upgrades where a participant is both eligible for the LIFT pilot and other funding sources such as the Low-income Home Energy Assistance Program ("LIHEAP") and the Weatherization Assistance Program ("WAP"). MCE will also leverage other agencies' programs such as the Multifamily Affordable Solar Housing ("MASH") program and water agency programs to maximize both energy and water savings.

<sup>20</sup> See MCE Testimony, Exhibit C at 16-19.

<sup>21</sup> Trusted messengers include third party local organizations and community leaders that are well-known and trusted in the low-income communities MCE is focusing on with this pilot. Due to trusted messengers' status in these communities, they will help alleviate customer concerns about program participation and help target messaging to effectively reach hidden communities and drive participation.

(2) the percentage of participants that leveraged subsidies from health and safety programs because of the LIFT pilot's efforts; (3) the percentage of participants that engage with LIFT and that meet one or more of the criteria that define "hidden communities";<sup>22</sup> (4) the number of fuel switching heat pumps installed, including the number of heat pumps that address existing health and safety concerns; (5) the percentage of participants that receive training to facilitate ongoing maintenance of energy savings upgrades; and (6) tracking efforts to mitigate the split incentive issue, which includes tracking the number of participating tenant units that pay their own utility bills and the number of units that receive comprehensive upgrades.

Because MCE will rely heavily on CBOs to identify hidden communities, encourage ESA enrollment, and drive program participation, MCE will also track the percentage of participants that engaged in CBO education workshops and the percentage of participants that found the workshops useful.

MCE presents its LIFT pilot metrics for the multifamily component as Attachment 2.

### **Conclusion**

Pursuant to OP 147 of D.16-11-022, MCE has provided the metrics that MCE will use to track its LIFT pilot and advises the Commission of revisions MCE made to the pilot's budget allocation and energy savings targets.

### **Notice**

Anyone wishing to protest this advice filing may do so by letter via U.S. Mail, facsimile, or electronically, any of which must be received no later than 20 days after the date of this advice filing. Protests should be mailed to:

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102  
Email: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Copies should also be mailed to the attention of the Director, Energy Division, Room 4004 (same address as above).

In addition, protests and all other correspondence regarding this AL should also be sent by letter

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<sup>22</sup> In addition to addressing landlord and tenant concerns about health and safety violations, MCE developed metrics that will focus on identifying "hidden communities" that exist because of feared consequences that may result from sharing personal information. These metrics will track the percentage of participants that: (1) receive program information in a language other than English; (2) report past non-participation due to the abovementioned apprehensions; (3) are outside of the Cal Enviro Screen 2.0 designated disadvantaged areas; and (4) live in units with extended or multiple families.

and transmitted via facsimile or electronically to the attention of:

Michael Callahan  
Regulatory Counsel  
Marin Clean Energy  
1125 Tamalpais Ave.  
San Rafael, CA 94901  
Phone: (415) 464-6045  
Facsimile: (415) 459-8095  
[mcallahan@mceCleanEnergy.org](mailto:mcallahan@mceCleanEnergy.org)

Beckie Menten  
Energy Efficiency Director  
Marin Clean Energy  
1125 Tamalpais Ave.  
San Rafael, CA 94901  
Phone: (415) 464-6034  
Facsimile: (415) 459-8095  
[bmenten@mceCleanEnergy.org](mailto:bmenten@mceCleanEnergy.org)

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

MCE is serving copies of this advice filing to the relevant parties shown on the A.14-11-007 et al. service list. For changes to this service list, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov).

### **Correspondence**

For questions, please contact Michael Callahan at (415) 464-6045 or by electronic mail at [mcallahan@mceCleanEnergy.org](mailto:mcallahan@mceCleanEnergy.org).

/s/ Michael Callahan  
Michael Callahan  
Regulatory Counsel  
Marin Clean Energy

Nathaniel Malcolm  
Regulatory Law Clerk  
Marin Clean Energy

cc: Service List A.14-11-007 et al.

**Attachment 1**  
**LIFT Pilot Single Family Barriers and Metrics Table**



**LIFT Pilot Single Family Barriers and Metrics Table**

Problem Statement	Market Barriers	Desired Effects/2-year vision	Intervention Strategies	Metrics	Metric Source	Baseline	Short Term Target (1 year)	Mid Term Target (2 years)
Many low income individuals in single-family homes have limited assets available to devote to EE.	Financial Barrier	Low income Individuals are made more aware of low or no-cost energy-saving strategies, rebates and financing available to them. Low income individuals begin to accrue savings from energy conservation actions taken.	Mobile app-based behavior program; Mobile app-based information tool about rebates and financing; Matched Energy Savings Account; Education Program	1. total number of app users 2. repeat visits by users 3. rated usefulness of app 4. number of customers signed up for MESA 5. amount of money distributed to participants 6. number of homes provided with education	1. app statistics 2. app statistics 3. user survey 4. MESA tracking database 5. MESA tracking database 6. CBO education workshop tracking database	Program Year 1	1. 150 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 250 participants 5. N/A 6. 50 homes	1. 500 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 600 participants 5. \$126,000 6. 100 homes
Many low income individuals in single-family homes may lack information about low and no-cost options to save energy.	Lack of Information	Low income individuals are provided with access to information about low and no-cost options to save energy	Mobile-based behavior program; Education Program	1. total number of app users 2. repeat visits by users 3. rated usefulness of app 4. number of homes provided with education	1. app statistics 2. app statistics 3. user survey 4. CBO education workshop tracking database	Program Year 1	1. 150 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 50 homes	1. 500 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 100 homes
Many low income individuals in single-family homes may have limited access to web-based EE tools that require access to a computer with internet service.	Limited access to information	Low income individuals who do not have access to a computer with internet service are able to access EE tools via their mobile phones through an app	Mobile-based behavior program; Mobile-based information of rebates and financing	1. total number of app users 2. repeat visits by users 3. rated usefulness of app 4. number of homes provided with education	1. app statistics 2. app statistics 3. user survey 4. CBO education workshop tracking database	Program Year 1	1. 150 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 50 homes	1. 500 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 100 homes
Low income tenants are impacted by split incentives: landlords have little incentive to implement EE because they do not pay the utility bill and tenants have little incentive to invest in a property owned by someone else.	Split Incentive	Low income tenants are made aware of low or no-cost strategies for saving energy. Payback period for investments made by tenants in EE equipment is shortened by the Matched Energy Saving Account.	Mobile-based behavior program; Matched Energy Savings Account	1. total number of app users 2. repeat visits by users 3. rated usefulness of app 4. number of customers signed up for MESA 5. Amount of money distributed to participants	1. app statistics 2. app statistics 3. user survey 4. MESA tracking database 5. MESA tracking database	Program Year 1	1. 150 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 250 participants 5. N/A	1. 500 users 2. 50% use app more than once 3. 70% of users rate app as useful or very useful 4. 600 participants 5. \$126,000

**Attachment 2**  
**LIFT Pilot Multifamily Barriers and Metrics Table**

## LIFT Pilot Multifamily Barriers and Metrics Table

Problem Statement	Market Barriers	Desired Effects/2-Year Vision	Intervention Strategies	Metrics	Baseline	Metric Source	Short-Term Target (1 Year) <sup>1</sup>	Mid-Term Target (2 Year) <sup>1</sup>
Property owners fear that an energy efficiency program will uncover existing perceived violations and lead to a building enforcement action. Tenants similarly fear triggering an enforcement action that may result in landlord retaliation.	Fear of consequences related to perceived health and safety code violations.	Properties complete comprehensive upgrades using resources from multiple programs.	<p>1. Provide technical assistance (including access to health and safety resources) to landlords, paired with rebates for energy efficiency improvements to upgrade properties.</p> <p>2. Leverage Weatherization Assistance Program (WAP) and Low-Income Home Energy Assistance Program (LIHEAP) for health and safety improvements.</p>	<p>1. % of participating units that have not previously participated in energy efficiency programs due to lack of access to health and safety resources.</p> <p>2. % of participating units that use WAP, LIHEAP, or other program funds to address perceived health and safety problems after being referred by the LIFT program.<sup>2</sup></p>	Program Year 1	<p>1. Post project survey<sup>3</sup></p> <p>2. Program tracking data<sup>4</sup></p>	<p>1. 20% (110/550 units)</p> <p>2. 15% (83/550 units)</p>	<p>1. 20% (186/932 units)</p> <p>2. 15% (140/932 units)</p>
The apprehension of the consequences around income verification and sharing of personal information creates a barrier to program participation even if the consequences will not actually occur.	Fear of consequences related to personal information disclosure.	Increased participation from "hidden communities" as participants are assured that it is safe to share information with the program.	1. Work with community based organizations (CBOs) and trusted messengers <sup>5</sup> to educate residents on the value of programs, benefits of energy efficiency, and address the concerns (particularly around citizenship) prohibiting them from participation.	<p>1. % of units meeting one or more of the following criteria:</p> <ul style="list-style-type: none"> <li>- residents receive program information in a language other than English (will track languages).</li> <li>- residents are engaged by CBOs who indicate they had not previously participated in energy efficiency programs due to concerns around sharing personal information.</li> <li>- located outside of Cal Enviro Screen 2.0 designated disadvantaged communities.</li> <li>- are occupied by extended or multiple families.</li> </ul>	Program Year 1	1. Program tracking data	1. 40% (220/550 units)	1. 40% (373/932 units)
Programs targeting tenants rather than landlords may miss an opportunity to capture site energy savings by leveraging existing energy efficiency programs.	Current low-income program design limits potential for comprehensive savings.	Program design serves both owners and tenants allowing for comprehensive upgrades.	1. Layer the LIFT incentives with MCE's Multifamily Energy Savings Program rebates and provide access to additional conservation programs (water, renewables, health and safety, EV, storage, DR).	<p>1. % of properties completing in-unit and whole building measures.</p> <p>2. % of properties leveraging additional resource conservation programs (not including health and safety).</p>	Program Year 1	<p>1. Program tracking data</p> <p>2. Program tracking data</p>	<p>1. 60% (7-14 properties)</p> <p>2. 30% (4-7 properties)</p>	<p>1. 60% (7-14 properties)</p> <p>2. 30% (4-7 properties)</p>

<sup>1</sup> MCE assumes it will serve 550 units in the first year of the program and 932 units in the second year, touching between 12-24 properties in total. Second year targets are not cumulative.

<sup>2</sup> This is dependent on continued Federal funding of the LIHEAP program.

<sup>3</sup> Community Based Organization (CBO) partners will conduct pre and post surveys enabling program participants (or those who don't participate) to self-report on the barriers, their demographics, and general feedback on program implementation and offerings.

<sup>4</sup> Program tracking data/CBO tracking data refers to the information collected and maintained by MCE and its partners to validate and prove claims of success. MCE and partners will use spreadsheets, databases, and/or a customer relationship management tool to track and report the information collected.

<sup>5</sup> Trusted Messengers include third party local organizations and community leaders that are well-known and trusted in the low-income communities MCE is focusing on with this pilot. Due to trusted messengers' status in these communities, they will help alleviate customer concerns about program participation and help target messaging to effectively reach hidden communities and drive participation.

**LIFT Pilot Multifamily Barriers and Metrics Table, continued**

Problem Statement	Market Barriers	Desired Effects/2-Year Vision	Intervention Strategies	Metrics	Baseline	Metric Source	Short-Term Target (1 Year) <sup>1</sup>	Mid-Term Target (2 Year) <sup>1</sup>
Fuel-switching measures are hard to justify as the benefits are not considered when compared to existing technology.	Upfront cost of fuel switching (including electrical upgrades)	The full potential of fuel switching measures is valued and they are installed through the program.	1. Replacing problematic natural gas heating or hot water system equipment to resolve health and safety issues and improve the efficiency of a home's heating system.	1. # of heat pumps installed. 2. % of heat pump installations at properties with known Combustion Appliance Safety (CAS) test issues.	Program Year 1	1. Program tracking data 2. Program tracking data	1. 25 heat pumps 2. 70% (18 heat pumps)	1. 75 heat pumps 2. 70% (53 heat pumps)
Lack of landlord engagement leaves landlords and property maintenance professionals unaware of the replacement schedules for equipment in their facilities or even which technologies have been installed in units.	Program design limits knowledge transfer to property owners/maintenance staff.	Property owners and/or maintenance staff are well informed about the equipment type and replacement schedules after a project is complete.	1. Leverage MCE's Multifamily Energy Savings Program to ensure maintenance and operations staff are trained on trouble shooting new equipment and have documentation identifying all newly installed equipment. 2. Develop equipment inventories and replacement plans to maximize long-term energy savings.	1. % of properties whose maintenance staff receive operation and maintenance training on new equipment. 2. % of property owners who receive comprehensive equipment inventories detailing replacement timelines for existing in-unit and common area equipment.	Program Year 1	1. Program tracking data 2. Program tracking data	1. 100% (12-24 buildings) 2. 100% (12-24 buildings)	1. 100% (12-24 buildings) 2. 100% (12-24 buildings)
Tenants' lack of understanding of energy and energy efficiency prevents them from accessing the necessary resources to achieve long-term change.	Lack of information.	Low-income tenants are provided with education and behavior programs that meet the immediate needs of the participants and facilitate and maintain long-term behavior change.	1. Partner with CBOs to design effective energy efficiency workshops that will result in meaningful change for participants.	1. # of participants attending energy efficiency workshops. 2. % of participants who rate the workshop as very useful.	Program Year 1	1. CBO tracking data 2. Participant survey	1. 20 attendees per workshop/5 workshops per year 2. 80% (16 attendees)	1. 20 attendees per workshop/10 workshops per year 2. 80% (16 attendees)
Renters are typically responsible for paying their own utility bill, disincentivizing owners from paying for in-unit upgrades. This issue is exacerbated in low-income properties where property owners have limited ability to pass the cost of upgrades on to tenants in the form of higher rent.	Split-incentive issue.	Comprehensive in-unit energy efficiency improvements are valued and desired by owners.	1. Layer the LIFT incentives with MCE's Multifamily Energy Savings Program to provide up to an additional \$1,200 per unit over normal incentive levels.	1. % of units where the tenants pay the utility bill. 2. % of units receiving comprehensive upgrades. <sup>6</sup>	Program Year 1	1. Program tracking data 2. Program tracking data	1. 60% (330/550 units) 2. 30% (165/550 units)	1. 60% (560/932 units) 2. 30% (280/932 units)

<sup>6</sup> Comprehensive upgrades refers to projects with multiple measures that have different end uses.

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY LSE (Attach additional pages as needed)

Company name/CPUC Utility No. Marin Clean Energy

Utility type:

ELC     GAS  
 PLC     HEAT     WATER

Contact Person for questions and approval letters: Michael Callahan

Phone #: (415) 464-6045

E-mail: [mcallahan@mcecleanenergy.org](mailto:mcallahan@mcecleanenergy.org)

### EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas  
PLC = Pipeline      HEAT = Heat      WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: MCE 23-E

Subject of AL: Identification of Metrics to Track Marin Clean Energy's Low Income Families and Tenants Pilot

Tier Designation:  1  2  3

Keywords (choose from CPUC listing): Compliance

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other \_\_\_\_\_

If AL filed in compliance with a Commission order, indicate relevant Decision: D.16-11-022, OP 147

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL \_\_\_\_\_

Summarize differences between the AL and the prior withdrawn or rejected AL<sup>1</sup>: \_\_\_\_\_

Resolution Required?  Yes  No

Requested effective date: May 6, 2017

No. of tariff sheets: 0

Estimated system annual revenue effect (%): n/a

Estimated system average rate effect (%): n/a

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: n/a

Service affected and changes proposed<sup>1</sup>:

Pending advice letters that revise the same tariff sheets: none

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:**

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Ave.  
San Francisco, CA 94102  
[EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Utility Info (including e-mail)  
Marin Clean Energy  
Michael Callahan, Regulatory Counsel  
1125 Tamalpais Ave. San Rafael, CA 94901  
[mcallahan@mcecleanenergy.org](mailto:mcallahan@mcecleanenergy.org)

<sup>1</sup> Discuss in AL if more space is needed.