



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: **Marin Clean Energy ("MCE")**

Utility type:



ELC



GAS



WATER



PLC



HEAT

Contact Person: **Stephanie Chen**

Phone #: **(415) 464-6664**

E-mail: **schen@mcecleanenergy.org**

E-mail Disposition Notice to: **schen@mcecleanenergy.org**

EXPLANATION OF UTILITY TYPE

ELC = Electric

GAS = Gas

WATER = Water

PLC = Pipeline

HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Monday, December 6, 2021

Advice Letter (AL) #: **56-E**

Tier Designation: **1**

Subject of AL: **Updates to Marin Clean Energy's Low Income Families and Tenants Pilot**

Keywords (choose from CPUC listing): **CARE, ESA, and FERA**

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: **D.21-06-015**

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: **N/A**

Summarize differences between the AL and the prior withdrawn or rejected AL: **N/A**

Confidential treatment requested? ☐ Yes ☒ No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information: **Stephanie Chen, schen@mcecleanenergy.org**

Resolution required? ☐ Yes ☒ No

Requested effective date: **12/6/21**

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 proposed¹: **N/A**

Pending advice letters that revise the same tariff sheets: **N/A**

¹Discuss in AL if more space is needed.

Clear Form

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

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

Name: **Stephanie Chen**
Title: **Senior Policy Counsel**
Utility Name: **MARIN CLEAN ENERGY**
Address: **1125 Tamalpais Avenue**
City: **San Rafael**
State: **California** Zip: **94901**
Telephone (xxx) xxx-xxxx: **(415) 464-6664**
Facsimile (xxx) xxx-xxxx:
Email: schen@mccleanenergy.org

Name:
Title:
Utility Name:
Address:
City:
State: **District of Columbia** Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Clear Form

ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtailable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	

Clear Form



MARIN COUNTY | NAPA COUNTY | UNINCORPORATED CONTRA COSTA COUNTY | UNINCORPORATED SOLANO COUNTY
BENICIA | CONCORD | DANVILLE | EL CERRITO | FAIRFIELD | LAFAYETTE | MARTINEZ | MORAGA | OAKLEY
PINOLE | PITTSBURG | PLEASANT HILL | RICHMOND | SAN PABLO | SAN RAMON | VALLEJO | WALNUT CREEK

December 6, 2021

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

MCE Advice Letter 56-E

Re: Updates to Marin Clean Energy's Low Income Families and Tenants Pilot

Pursuant to California Public Utilities Commission (CPUC or Commission) Decision (D.)21-06-015, *Decision on Large Investor-Owned Utilities' and Marin Clean Energy's California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rate Assistance (FERA) Program Applications for Program Years 2021-2026* and guidance from the CPUC staff, Marin Clean Energy (MCE) hereby submits the following updates to its Low Income Families and Tenants (LIFT) Pilot as MCE Advice Letter (AL) 56-E.

Tier Designation

This AL has a Tier 1 designation pursuant to Ordering Paragraph (OP) 158 of D.21-06-015.

Effective Date

Pursuant to General Order (G.O.) 96-B Section 7.3.3 and Energy Industry Rule 5.1, MCE requests that this Tier 1 AL be deemed effective pending disposition.

Purpose

The purpose of this AL is to update MCE's LIFT program design, example measure offerings, treatment and savings goals, program manual, and evaluation plan, as directed by D.21-06-015.

Background

MCE's LIFT pilot was originally proposed in Application (A.)14-11-007 *et al.* and authorized in D.16-11-022 as a two-year pilot with a budget of \$3.5 million. In 2019, MCE was granted a timeline-only extension which allowed MCE to continue spending its authorized LIFT budget beyond the original two-year pilot period. In A.19-11-007, MCE applied for authorization to

administer LIFT as a full multifamily whole building program under ESA for program years 2021-2026. In D.21-06-015, the Commission authorized an extension of the LIFT pilot until December 31, 2023 with a budget of \$3.25 million.

Discussion

As directed in D.21-06-015, MCE provides the following updates to the LIFT pilot design, an example list of measure offerings for both energy efficiency and electrification, and updated treatment and energy savings goals for program years 2021-2023.¹ MCE also provides the updated LIFT program manual, and its proposed evaluation plan for program years 2021-2023 as well as for the full LIFT pilot. Finally, MCE also proposes minor changes to the LIFT monthly and quarterly reporting templates.

Program Design Updates

D.21-06-015 directed several changes to the ESA program that extend to MCE's LIFT pilot. First, non-deed restricted multifamily properties that meet the program's income requirements will be eligible for LIFT.² If MCE enrolls any non-deed restricted properties for whole building treatment, MCE will enter into a rent restriction agreement with the property owner in accordance with D.21-06-015.³ Second, the income qualification threshold for a property to receive whole building or full property treatment under LIFT will be lowered from 80% of units at the property meeting income requirements to 65% for deed restricted properties.⁴ Third, property owners will be permitted to verify tenants' income on the tenants' behalf, by providing appropriate and current income eligibility documentation, for purposes of enrolling either individual tenant units or the whole building if sufficient tenant units meet the applicable income requirements.⁵

Additionally, MCE will no longer track participation in the LIFT program among "hidden communities." MCE will instead track program participation among 1) households in Environmental and Social Justice (ESJ) Communities as defined in the CPUC's ESJ Action Plan, and 2) households in the communities identified as having the highest affordability ratios (AR₂₀) in the most recent CPUC Annual Affordability Report.

Measures

The measures provided through the LIFT pilot extension may expand in response to newly developed workpapers, which will allow LIFT to adapt to technological advances and incorporate emerging technologies.

MCE also proposes to expand LIFT's direct install offerings to include refrigerators, packaged terminal heat pumps (PTHPs), and light fixtures, in addition to smart thermostats, low flow aerators and showerheads, and light-emitting diode (LED) bulbs.

¹ MCE's program year 2021 started June 7, 2021, the date of issuance of D.21-06-015.

² D.21-06-015, OP 132.

³ *Id.* at OP 139.

⁴ *Id.* at OPs 133 and 134.

⁵ *Id.* at OPs 135, 136, and 137.

Examples of measures that may be provided under the LIFT pilot extension include, but are not limited to:

Energy Efficiency Measures

- Low Flow Bath Aerator
- Low Flow Kitchen Aerator
- Low Flow Showerhead
- T24 Compliant Windows
- Crawlspace Insulation (\$/sqft)
- In Unit Energy Star Laundry Washer
- Hardwired In Unit LED Fixture
- Hardwired In Unit LED Retrofit
- Duct Sealing/Replacement
- Wall Insulation (\$/sqft)
- Roof Insulation (\$/sqft)
- Energy Star Refrigerator
- Energy Star Water Heater
- Tankless Water Heater
- Inverter Driven Split/PTAC Air Conditioner
- Window AC Unit
- Smart Thermostat

Electrification Measures⁶

- Domestic Hot Water (DHW) (Gas/Propane to heat pump water heater)
 - Central DHW
 - Apartment DHW
 - Apartment DHW with newly installed hydronic fan coil/heat emitter
- Space Heating (Gas/Propane Heating, No A/C Existing)
 - Ductless Mini Split (assumes newly installed)
 - Central Heat Pump (serves multiple units)
 - Package Terminal Heat Pump (assumes newly installed)
 - Ducted Split Heat Pump (assumes replacing gas furnace air handling unit (AHU))
- Space Heating (Gas/Propane Heating, A/C Existing)
 - Ductless Mini Split (assumes newly installed)
 - Central Heat Pump (serving multiple units)
 - Package Terminal Heat Pump (assumes replacing existing PTAC)

⁶ As directed in D.21-06-015, OP 158, all fuel substitution measures will pass the latest Commission Fuel Substitution Test.

- Ducted Split Heat Pump (assumes replacing existing split A/C)
- Rooftop Packaged Heat Pump (assumes replacing existing dual pack)
- Electrical Upgrades (as needed)
 - In Unit Panel Upgrades
 - Additional In Unit Electrical Upgrades
 - New conduit to heat pump
 - Replace disconnect at meter bank
 - Upsize feeder cable
 - Replace service disconnect at switchboard
 - New electrical conduit to heat pump (per circuit)
 - Common Area Panel Upgrade
 - Additional Common Area Electrical Upgrades
 - New conduit to heat pump
 - Replace disconnect at meter bank
 - Upsize feeder cable
- Induction Stove
- Heat Pump Dryer

To better align with MCE’s decarbonization goals, as a general matter the LIFT pilot will no longer support natural gas measures. MCE will only offer gas measures when electrifying an end-use is deemed infeasible.

MCE also proposes to continue LIFT’s unique ability to support the replacement of propane and wood-burning appliances with electric alternatives to help communities without access to natural gas (fuel switching). MCE will continue to cap fuel switching at 10% of the total heat pumps installed through the LIFT pilot. Switching from propane to electric space or water heating represents a unique opportunity to reduce customers’ energy costs, improve indoor air quality,⁷ and provide valuable data to inform electrification policy decisions. The elimination of propane also supports MCE’s climate change goals and reduces the emission of air pollutants.

Incentives

The LIFT pilot extension will increase the incentive levels for measures that have shown to be more costly than initially anticipated. The per-unit cap on energy efficiency measures will remain at \$1,200. However, MCE will provide an \$800 adder for Title 24 Compliant Windows and a \$1,300 adder for inverter-driven PTHPs to offer better cost coverage of these measures.

MCE proposes to maintain the ability to adjust measure incentives to reflect additional data collected on actual project costs. MCE and the LIFT program implementer will conduct annual mid-year reviews to ensure the program incentives align with current measure costs.

⁷ The Evaluation Report from the first three years of the LIFT Pilot demonstrated that replacing propane furnaces and water heaters with electric heat pumps significantly reduced NOx emissions, as well as CO2. MCE Low-Income Families and Tenants Pilot Program Evaluation, August 5, 2021, p. 29.

Energy Efficiency

Measure	LIFT 1.0 Incentive	LIFT Extension Incentive
Low Flow Bath Aerator	\$10.00	\$10.00
Low Flow Kitchen Aerator	\$10.00	\$10.00
Low Flow Showerhead	\$25.00	\$25.00
T24 Compliant Windows	\$33.33 (\$/sqft)	\$2,000 (\$/unit)
Crawlspace Insulation (\$/sqft)	\$1.50	\$1.50
In Unit Energy Star Laundry Washer	\$800.00	\$800.00
Hardwired In Unit LED Fixture	\$150.00	\$150.00
Hardwired In Unit LED Retrofit	\$60.00	\$60.00
Duct Sealing/Replacement	\$500.00	\$500.00
Wall Insulation (\$/sqft)	\$2.00	\$2.00
Roof Insulation (\$/sqft)	\$1.50	\$1.50
Energy Star Refrigerator	\$650.00	\$650.00
Energy Star Water Heater	\$1,200.00	Gas measures no longer incentivized.
Tankless Water Heater	\$1,200.00	Gas measures no longer incentivized.

Inverter Driven Split/PTAC Air Conditioner	\$1,200.00	\$2,500.00
Window AC Unit	\$400.00	\$400.00
Smart Thermostat	\$175.00	\$175.00

Electrification

System Type	Electrification Measure	LIFT 1.0 Incentive ⁸	LIFT Extension Incentive
DHW (Gas/Propane to HPWH)	Central DHW	\$1,500	\$1,500
	Apartment DHW	\$2,000	\$2,500
	Apartment DHW with newly installed hydronic fan coil/heat emitter	\$3,000	\$3,500
Space Heating (Gas/Propane Heating, No A/C Existing)	Ductless Mini Split (assumes newly installed)	\$5,000	\$6,000 (assuming 1 head unit) + \$1,000/additional head units
	Central Heat Pump (serves multiple units)	\$3,750	\$3,750
	Package Terminal Heat Pump (assumes newly installed)	\$2,500	\$2,500
	Ducted Split Heat Pump (assumes replacing gas furnace AHU)	\$4,500	\$4,500

⁸ LIFT 1.0 refers to program years 2017 through May 31, 2021.

Space Heating (Gas/Propane Heating, Yes A/C Existing)	Ductless Mini Split (assumes newly installed)	\$5,000	\$6,000 (assuming 1 head unit) + \$1,000/additional head units
	Central Heat Pump (serving multiple units)	\$3,750	\$3,750
	Package Terminal Heat Pump (assumes replacing existing PTAC)	\$1,500	\$1,500
	Ducted Split Heat Pump (assumes replacing existing split A/C)	\$3,500	\$3,500
	Rooftop Packaged Heat Pump (assumes replacing existing dual pack)	\$3,000	\$3,000
Electrical Upgrades (as needed)	In Unit Panel Upgrades	\$1,200	\$1,000
	Additional In Unit Electrical Upgrades · New conduit to heat pump · Replace disconnect at meter bank · Upsize feeder cable · Replace service disconnect at switchboard	-	\$500/upgrade
	New electrical conduit to heat pump (per circuit)	\$400	Included above
	Common Area Panel Upgrade	-	\$1,500

	Additional Common Area Electrical Upgrades · New conduit to heat pump · Replace disconnect at meter bank · Upsize feeder cable		\$500/upgrade
	Induction Stove	-	\$1,000
	Heat Pump Dryer	-	\$800

Treatment and Energy Savings Goals

MCE proposes the following treatment and energy savings goals for the remainder of the LIFT pilot.

Year	Number of Units Served	Estimated kWh Savings ⁹	Estimated Therm Savings
2021 ¹⁰	150	12,000	500
2022	300	39,546	2,319.64
2023	450	43,442	2,488.84
Total	900	82,988	4,808.48

⁹ With the increased incentives for costly measures such as Title 24 Compliant Windows and PTHPs, MCE foresees LIFT energy savings will increase over time. Program participants will now take full advantage of the \$1,200 incentive for more energy-saving measures.

¹⁰ As noted above, program year 2021 began in June 2021 and extends through December 31, 2021.

Year	Number of DHW Heat Pump Installations ¹¹	Number of HVAC Heat Pump Installations
2021	0 ¹²	25
2022	2	25
2023	3	35
Total	5	85

Program Budget

The budget below includes \$3,250,000 authorized to MCE for the LIFT extension as well as unused funds from the first iteration of the LIFT Pilot.

LIFT Extension Budget			
	2021	2022	2023
<i>Administration</i>	\$105,911	\$170,911	\$170,911
<i>Direct Implementation</i>	\$264,777	\$427,277	\$427,277
<i>Incentives</i>	\$582,510	\$940,010	\$940,010
<i>Marketing & Outreach</i>	\$52,955	\$85,455	\$85,455
<i>EM&V</i>	\$52,955	\$85,455	\$85,455
Total	\$1,059,108	\$1,709,108	\$1,709,108
Total Program Budget	\$4,477,325		

¹¹ Central Domestic Hot Water Heater Heat Pump serving multiple tenant units.

¹² Central heat pump water heating projects can take several months to develop and several more to complete. MCE did not pursue any of these projects in the first half of 2021, as it was disposition of A.19-11-007.

Updated Program Manual

The updated LIFT Program Manual is attached to this AL as Attachment A, including an updated metrics table, set forth as Appendix A to the updated LIFT Program Manual.

Evaluation Plan

The updated LIFT Evaluation Plan is attached to this AL as Attachment B.

Proposed Adjustments to Monthly and Quarterly Reporting Templates

MCE proposes minor adjustments to the monthly and quarterly LIFT reporting templates. The templates have been updated to reflect the current example measure list. The updated templates also include additional information (*i.e.*, including savings goals along with actual and projected savings) to provide more context to the Commission and stakeholders. The proposed monthly and quarterly LIFT reporting templates are attached to this AL as Attachment C.

Notice

A copy of this AL is being served on the official Commission service list for A.19-11-003 *et al.*

For changes to these service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

Protests

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

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 and transmitted electronically to the attention of:

Stephanie Chen
Senior Policy Counsel
Marin Clean Energy
1125 Tamalpais Ave.

San Rafael, CA 94901
Phone: (415) 464-6664
Facsimile: (415) 459-8095
schen@mceCleanEnergy.org

Alice Havenar-Daughton
Director of Customer Programs
Marin Clean Energy
1125 Tamalpais Ave.
San Rafael, CA 94901
Phone: (415) 464-6030
Facsimile: (415) 459-8095
ahavenar-daughton@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.

Correspondence

For questions, please contact Stephanie Chen at (415) 464-6664 or by electronic mail at schen@mceCleanEnergy.org.

/s/ Stephanie Chen

Stephanie Chen
Senior Policy Counsel
MARIN CLEAN ENERGY
1125 Tamalpais Avenue
San Rafael, CA 94901
Telephone: (415) 464-6664
Email: schen@mcecleanenergy.org

Attachments

Attachment A: Updated LIFT Program Manual
Attachment B: Updated LIFT Evaluation Plan
Attachment C: Updated Monthly and Quarterly Reporting Templates

cc: Service List for A.19-11-003 *et al.*

Attachment A to MCE Advice Letter 56-E

Updated LIFT Program Manual



Low Income Families and Tenants Pilot Program

Program Manual

Updated December 6, 2021

TABLE OF CONTENTS

I.	PROGRAM OVERVIEW.....	1
A.	Program Background and Description	1
B.	Program Goals.....	1
II.	PROGRAM COMPONENTS.....	3
A.	Energy Efficiency Upgrades.....	3
B.	Heat Pumps.....	3
C.	Outreach	4
III.	PROGRAM MEASURES & INCENTIVES.....	4
A.	Program Measures.....	4
B.	Program Incentives	6
IV.	PROGRAM ADMINISTRATOR AND IMPLEMENTATION PARTNERS: ROLES AND RESPONSIBILITIES	8
A.	MCE	8
B.	Program Implementer	8
C.	Evaluation Measuring and Verification (EM&V) Partner	9
D.	California Public Utilities Commission, Energy Division, Low-Income Oversight Board.....	9
E.	Heat Pump Participating Contractors	9
V.	PROGRAM PROCESS.....	9
VI.	ELIGIBILITY.....	11
A.	MCE Service Area	11
B.	Tenants at or below the 200% Federal Poverty Guidelines.....	12
C.	In-Unit and Common Area Treatment	12
D.	Income Qualifying All Resident Units at a Property.....	12
E.	Documentation	13
VII.	REPORTING	13
A.	Savings Attribution.....	13
B.	Reporting Schedule.....	13

APPENDICES

Appendix A	17
Appendix B	19
Appendix C	21
Appendix D	23
Appendix E	26
Appendix F	27

I. PROGRAM OVERVIEW

A. Program Background and Description

Marin Clean Energy (MCE) is California's first Community Choice Aggregation program. MCE focuses on addressing climate change by reducing energy related greenhouse gas emissions through renewable energy supply and energy efficiency. MCE serves residents in Marin and Napa Counties, unincorporated Contra Costa and Solano Counties, and the Cities and Towns of Benicia, Concord, Danville, El Cerrito, Lafayette, Martinez, Moraga, Oakley, Pinole, Pittsburg, Pleasant Hill, Richmond, San Pablo, San Ramon, Vallejo and Walnut Creek. MCE will begin service to the city of Fairfield in April 2022.

In November of 2016, the California Public Utilities Commission (CPUC) granted MCE \$3.5 million over two years to deliver the Low-Income Families and Tenants (LIFT) pilot program. The pilot launched on October 31, 2017. MCE's LIFT program provides technical assistance, energy efficiency rebates, and fuel substitution opportunities from gas and propane to electric heat pumps to income-qualified multifamily property owners and residents. MCE developed the LIFT pilot program to better serve income-qualified multifamily properties not currently benefiting from general energy efficiency programs and other low-income energy savings programs.

In October 2019, MCE was granted an initial timeline-only extension, which ended on May 31, 2021. Thereafter, in CPUC Decision (D.)21-06-015 (issued June 7, 2021), the CPUC granted the LIFT pilot with a final extension through 2023 and an additional \$3.25 million to carry out the last phase of the program.

B. Program Goals

MCE proposes the following treatment and energy savings goals for the remainder of the LIFT pilot.

Year	Number of Units Served	Estimated kWh Savings ¹	Estimated Therm Savings
2021 ²	150	12,000	500
2022	300	39,546	2,319.64
2023	450	43,442	2,488.84
Total	900	82,988	4,808.48

¹ With the increased incentives for costly measures such as Title 24 Compliant Windows and Packaged Terminal Heat Pumps (PTHPs), MCE foresees LIFT energy savings will increase over time. Program participants will now take full advantage of the \$1,200 incentive for more energy-saving measures.

² Program year 2021 began on June 7, 2021.

Year	Number of DHW Heat Pump Installations ³	Number of HVAC Heat Pump Installations
2021	0 ⁴	25
2022	2	25
2023	3	35
Total	5	85

i. General Program Goals

LIFT's key program goals are to:

- a) Serve 1,350 units over program years 2021 to 2023;
- b) Leverage LIFT with other incentives to encourage in-unit upgrades, alleviate administrative burden, and ease participation; and
- c) Ease program participation for hard-to-reach and multifamily renters by targeting property owners and managers

ii. Heat Pump Component Goals

LIFT seeks to:

- a) Replace natural gas and propane space or water heating equipment with heat pumps to improve tenant health, comfort, and safety;
- b) Install a total of 5 Central Domestic Hot Water Heater heat pumps and a total of 85 heating, ventilation, and air conditioning (HVAC) heat pumps;
- c) Collect data on the following to track the performance and costs associated with heat pump installations:
 - Reductions in Greenhouse Gas (GHG), Nitrogen Oxides (NOx), and Sulfur Oxides (SOx) emissions,
 - Bill savings to the customers,
 - Increasing source British thermal unit (BTU) savings, and
 - Non-energy benefits, such as improving residents' health, comfort, and safety; and
- d) Train contractors on installation best practices, refrigerant management, indoor air quality issues, certification, insurance, and permitting requirements.

In addition to the program goals, MCE developed specific metrics to track LIFT's success in achieving its goals. MCE will track and report metrics data to the CPUC. The complete list of metrics can be found in Appendix A to this Program Manual.

³ Central Domestic Hot Water Heater Heat Pump serving multiple tenant units.

⁴ Central heat pump water heating projects can take several months to develop and several more to complete. In 2021, MCE did not pursue any of these projects while awaiting confirmation on the LIFT program extension.

II. PROGRAM COMPONENTS

LIFT has three main components, which focus on energy efficiency, deconstruction of historical barriers to energy efficiency program delivery in income-qualified communities, and providing increased access to electrification and heat pump technology. These components are described in more detail below.

A. Energy Efficiency Upgrades

LIFT offers income-qualified multifamily property owners an opportunity to address the split-incentive issue by providing specific incentives for in-unit energy efficiency upgrades, as well as layering in-unit and common area rebates from MCE's Multifamily Energy Savings Program (MFES). MCE expects this pairing will ease the administrative burden of participating in energy efficiency programs, reduce resident utility bills, increase energy savings, and improve residents' health, safety and comfort. LIFT has also expanded its direct install offerings to include refrigerators, package terminal heat pumps, and light fixtures, in addition to smart thermostats, low flows, and light-emitting diode (LED) bulbs.

LIFT participants will receive:

- i. No-cost energy assessments and technical assistance;
- ii. Up to \$1,200 per unit to fund energy efficiency improvements and appliances inside of tenant units;
- iii. Additional incentives for more costly measures such as Title 24 Compliant Windows and inverter-driven Packaged Terminal Heat Pumps;
- iv. Additional rebates to lower the cost of projects, and no-cost energy and water-saving measures for resident units and common areas through the MFES program; and
- v. A no-cost direct install service to ease the resource burden of the program participant.

B. Heat Pumps

LIFT aims to create opportunities for fuel substitution and fuel switching away from natural gas and propane combustion appliances to high efficiency electric heat pumps. This transition will support cleaner and more efficient energy use while resolving health and safety concerns.⁵ The LIFT program funds will be used to:

- i. Cover, through rebates, a significant portion of water and space heating heat pumps purchase and installation;
- ii. Provide robust technical assistance to help property owners determine project feasibility;
- iii. Provide propane fuel switching for up to 10% of the total number of heat pumps installed; and
- iv. Provide additional incentives for electrical upgrades necessary to facilitate heat pump installation.

⁵ Heat pumps can be an effective measure to achieve energy savings from space heating. Additionally, in homes that do not have the existing cooling equipment, heat pumps can add a cooling load. The non-energy benefits of providing low-income customers with an efficient source of cooling could partially offset any added load due to the introduction of cooling to the home. Tracking non-energy benefits, such as increased comfort for elderly residents, will be an important aspect of this pilot. Participants who receive heat pumps will be provided with ongoing education and troubleshooting to ensure they understand the potential impact of the added load on their electricity bills.

C. Outreach

MCE identified the following barriers that have historically prevented renters in income-qualified multifamily housing from participating in energy efficiency programs:

- i. Fear of property owner retaliation;
- ii. Lack of control over any significant upgrades made to the individual units;
- iii. Concerns about sharing personal information; and
- iv. Financial constraints.

Additionally, complex and cumbersome program enrollment processes can dissuade otherwise interested property owners and managers from participating in energy savings programs. To alleviate these challenges:

- i. LIFT outreach will target property owners and managers. By working closely with County and City staff in MCE's service area, local housing agencies, and affordable housing nonprofits, MCE will identify property owners and managers interested in completing energy efficiency upgrade projects, which will minimize the need for residents to work with owners to participate in the program.
- ii. MCE will serve as the Single Point of Contact (SPOC) for property owners and managers. The SPOC acts as a facilitator and participant-advocate and remains engaged through project completion. The SPOC helps property owners and managers maximize the work done on a project by providing and bundling demand-side opportunities, phasing projects to incorporate additional technologies over time, and connecting property owners and managers to available financing programs. The SPOC will also assist in leveraging and streamlining the enrollment process for other MCE programs and income-qualified resource conservation programs.

III. PROGRAM MEASURES & INCENTIVES

A. Program Measures

The measures provided through the LIFT pilot extension has expanded in response to newly developed workpapers, which will allow LIFT to adapt to technological advances and incorporate emerging technologies.

MCE LIFT is also looking to expand its direct install offerings to include refrigerators, PTHPs, and light fixtures, in addition to smart thermostats, low flow aerators and showerheads, and LED bulbs.

Examples of measures that may be provided under the LIFT pilot extension include, but are not limited to:

Energy Efficiency Measures

- Low Flow Bath Aerator

- Low Flow Kitchen Aerator
- Low Flow Showerhead
- T24 Compliant Windows
- Crawlspace Insulation (\$/sqft)
- In Unit Energy Star Laundry Washer
- Hardwired In Unit LED Fixture
- Hardwired In Unit LED Retrofit
- Duct Sealing/Replacement
- Wall Insulation (\$/sqft)
- Roof Insulation (\$/sqft)
- Energy Star Refrigerator
- Energy Star Water Heater
- Tankless Water Heater
- Inverter Driven Split/PTAC Air Conditioner
- Window AC Unit
- Smart Thermostat

Electrification Measures

- Domestic Hot Water (DHW) (Gas/Propane to heat pump water heater)
 - Central DHW
 - Apartment DHW
 - Apartment DHW with newly installed hydronic fan coil/heat emitter
- Space Heating (Gas/Propane Heating, No A/C Existing)
 - Ductless Mini Split (assumes newly installed)
 - Central Heat Pump (serves multiple units)
 - Package Terminal Heat Pump (assumes newly installed)
 - Ducted Split Heat Pump (assumes replacing gas furnace air handling unit (AHU))
- Space Heating (Gas/Propane Heating, A/C Existing)
 - Ductless Mini Split (assumes newly installed)
 - Central Heat Pump (serving multiple units)
 - Package Terminal Heat Pump (assumes replacing existing PTAC)
 - Ducted Split Heat Pump (assumes replacing existing split A/C)
 - Rooftop Packaged Heat Pump (assumes replacing existing dual pack)
- Electrical Upgrades (as needed)
 - In Unit Panel Upgrades
 - Additional In Unit Electrical Upgrades
 - New conduit to heat pump
 - Replace disconnect at meter bank
 - Upsize feeder cable
 - Replace service disconnect at switchboard
- New Electrical Conduit to Heat Pump (per circuit)
- Common Area Panel Upgrade

- Additional Common Area Electrical Upgrades
 - New conduit to heat pump
 - Replace disconnect at meter bank
 - Upsize feeder cable
- Induction Stove
- Heat Pump Dryer

To better align with MCE’s decarbonization goals, the LIFT pilot will no longer support natural gas measures. MCE will only offer gas measures when electrifying an end-use is considered infeasible.

MCE also proposes to continue LIFT’s unique ability to support the replacement of propane and wood-burning appliances with electric alternatives to help communities without access to natural gas. MCE will continue to cap fuel switching at 10% of the total heat pumps installed through the LIFT pilot. Switching from propane to electric space or water heating represents a unique opportunity to reduce customers’ energy costs, improve indoor air quality, and provide valuable data to inform electrification policy decisions. The elimination of propane also supports MCE’s climate change goals and reduces the emission of air pollutants.

B. Program Incentives

The LIFT pilot provides \$1,200 per qualifying unit for energy efficiency upgrades (measures mentioned above) as well as an \$800 adder for Title 24 Compliant Windows and a \$1,300 adder for inverter-driven PTHPs.⁶

In addition to energy efficiency measures, the LIFT program provides incentives to encourage the switching from gas and propane water heating, and space heating and cooling equipment to high-efficiency electric heat pumps to help decarbonize space and water heating loads. Furthermore, LIFT also provides extra incentives to assist with expenses related to electrical upgrades required to install heat pumps.

ENERGY EFFICIENCY INCENTIVES	
Measure	LIFT Incentive
Low Flow Bath Aerator	\$10.00
Low Flow Kitchen Aerator	\$10.00
Low Flow Showerhead	\$25.00
T24 Compliant Windows	\$2,000 (\$/unit)
Crawlspace Insulation (\$/sqft)	\$1.50
In Unit Energy Star Laundry Washer	\$800.00

⁶ The LIFT pilot extension has increased the incentive levels for measures that have shown to be more costly than initially anticipated such as Title 24 Compliant Windows and inverter-driven PTHPs.

Hardwired In Unit LED Fixture	\$150.00
Hardwired In Unit LED Retrofit	\$60.00
Duct Sealing/Replacement	\$500.00
Wall Insulation (\$/sqft)	\$2.00
Roof Insulation (\$/sqft)	\$1.50
Energy Star Refrigerator	\$650.00
Energy Star Water Heater	Gas measures no longer incentivized.
Tankless Water Heater	Gas measures no longer incentivized.
Inverter Driven Split/PTAC Air Conditioner	\$2,500.00
Window AC Unit	\$400.00
Smart Thermostat	\$175.00

HEAT PUMP INCENTIVES		
System Type	Electrification Measure	LIFT Incentive
DHW (Gas/Propane to HPWH)	Central DHW	\$1,500
	In-unit DHW	\$2,500
	In-Unit DHW with newly installed hydronic fan coil/heat emitter	\$3,500
Space Heating (Gas/Propane Heating, No A/C Existing)	Ductless Mini Split (assumes newly installed)	\$6,000 (assuming 1 head unit) + \$1,000/additional head units
	Central Heat Pump (serves multiple units)	\$3,750
	Package Terminal Heat Pump (assumes newly installed)	\$2,500
	Ducted Split Heat Pump (assumes replacing gas furnace AHU)	\$4,500
Space Heating (Gas/Propane Heating, Yes A/C Existing)	Ductless Mini Split (assumes newly installed)	\$6,000 (assuming 1 head unit) + \$1,000/additional head units
	Central Heat Pump (serving multiple units)	\$3,750
	Package Terminal Heat Pump (assumes replacing existing PTAC)	\$1,500

	Ducted Split Heat Pump (assumes replacing existing split A/C)	\$3,500
	Rooftop Packaged Heat Pump (assumes replacing existing dual pack)	\$3,000
Electrical Upgrades (as needed)	In Unit Panel Upgrades	\$1,000
	Additional In Unit Electrical Upgrades <ul style="list-style-type: none"> ▪ New conduit to heat pump ▪ Replace disconnect at meter bank ▪ Upsize feeder cable ▪ Replace service disconnect at switchboard 	\$500/upgrade
	New electrical conduit to heat pump (per circuit)	Included above
	Common Area Panel Upgrade	\$1,500
	Additional Common Area Electrical Upgrades <ul style="list-style-type: none"> ▪ New conduit to heat pump ▪ Replace disconnect at meter bank ▪ Upsize feeder cable 	\$500/upgrade
	Induction Stove	\$1,000
	Heat Pump Dryer	\$800

IV. PROGRAM ADMINISTRATOR AND IMPLEMENTATION PARTNERS: ROLES AND RESPONSIBILITIES

The program implementation partners and their roles for LIFT are outlined below.

A. MCE

MCE is responsible for LIFT's program design, preparing program materials, delivering incentives, and managing implementers.

B. Program Implementer

The Association for Energy Affordability (AEA) is the implementation partner delivering both MFES and LIFT programs. For the LIFT pilot, AEA is responsible for daily operations, including but not limited to:

- i. Identifying participating properties;
- ii. Pre-screening properties for eligibility;
- iii. Performing income verification;
- iv. Conducting energy assessments;
- v. Vetting measure selection;
- vi. Assisting properties identify contractors and offering contractor support;
- vii. Managing day-to-day property manager interactions;
- viii. Delivering program technical assistance, project quality assurance and quality control;
- ix. Collecting and managing project data;
- x. Providing program reporting support;
- xi. Training the LIFT direct install service provider and heat pump contractors;
- xii. Working with the contractors to ensure installations meet the Minimum Performance Requirement,⁷
- xiii. Educating property staff on new technologies and equipment maintenance; and
- xiv. Managing the LIFT direct install service provider

C. Evaluation Measuring and Verification (EM&V) Partner

MCE works with Evergreen Economics to conduct LIFT's EM&V.

D. California Public Utilities Commission, Energy Division, Low-Income Oversight Board

LIFT is a pilot under the ESA Program, which is funded by non-bypassable charges on ratepayer utility bills.⁸ In addition to oversight provided by MCE's Board, the CPUC's Energy Division (ED) oversees LIFT.

E. Heat Pump Participating Contractors

MCE maintains a list of participating heat pump contractors from which LIFT participants may choose contractors for heat pump installation. This list will be made available to program participants through AEA.

V. PROGRAM PROCESS

1. Complete Online Interest Form

An interest form is available on MCE's website.⁹ Once MCE receives an interest form for a property indicating interest in MCE's Multifamily Energy Savings Program and/or LIFT, AEA will review the interest form to determine whether the property would be a good candidate for one or both programs.

2. Submit Intent to Proceed

⁷ The program implementer establishes the Minimum Performance Requirements for each measure and shares it with the contractor prior to installation.

⁸ The CPUC approved MCE's LIFT pilot and funding in D.16-11-022.

⁹ The online interest form can be found here: <https://www.mcecleanenergy.org/multifamily-savings/>.

AEA will schedule an initial call with the property owner or manager to discuss the property's needs and upgrade opportunities, the building characteristics, and property's affordability policy. This initial conversation will help AEA determine which MCE programs would best help accomplish the property's goals.

If a property is ready to move forward with either the MFES and/or LIFT programs, AEA will send the property owner an Intent to Proceed form (Appendix B).

Once AEA receives the completed Intent to Proceed form they will schedule a site assessment.

3. Organize and submit documents to determine income eligibility

AEA will work with property owners or managers to determine if units can be enrolled using the owner affidavit process (where the owner submits an Owner Affidavit Form (Appendix C) along with other necessary documentation). When a property owner/manager is unable to execute an owner affidavit, the property owner/manager has the option to income verify residents at the unit level using either a Resident Certification Form (Appendix D) or a Self-Certification Statement Form (Appendix E).

4. Schedule Assessment

Site assessments can take anywhere between 2-8 hours depending on the size of the property and must be scheduled when a property manager, maintenance supervisor, or other property staff member is present. During the assessment, AEA will evaluate both common areas and a sampling of units to identify energy efficiency and electrification opportunities. From the assessment, AEA will create a report that summarizes the opportunities available at the property and the total rebate amount for each measure.

5. Finalize Scope & Hire Contractors

In order to achieve the property's goals and maximize energy savings, AEA will support the property owner/manager in developing their scope of work and prioritizing the most cost-effective measures to be installed or upgraded. AEA can also assist the property owner in identifying contractors and developing bid packets if the property does not already have a preferred contractor.

6. Complete Construction & Direct Install

Program participants who may not have the available resources or staff to support extensive upgrades can benefit from LIFT's direct install (DI) service. Tenants may receive free LED light bulbs and ceiling fixtures, low-flow showerheads, and faucet aerators, as well as select appliances when deemed appropriate. The DI team will provide tenant education on energy efficiency and other ways to save additional money, including energy efficiency and conservation, CARE, and time-of-use (TOU) rates. Residents that upgrade from propane or gas appliances to electric heat pumps will receive further information on how to use their heat

pumps efficiently, how to use their thermostat, and how to minimize bill increases while also improving comfort and safety.¹⁰

7. Schedule Site Verification

AEA will conduct a post-project inspection to ensure the new measures are installed according to the Minimum Performance Requirements and MCE program standards. AEA will also conduct a post-project review in coordination with the property's operations and maintenance staff to train them on how the equipment works and how to maintain it. After the post-project inspection is complete, AEA will update the project's energy savings calculations and finalize the rebate amount. Afterward, the property owner will sign off on the Statement of Completion¹¹ (Appendix F) and submit relevant project invoices to AEA for final rebate approval.

8. Receive Rebate from MCE

MCE will process and send the rebate check to the property owner within six weeks from rebate approval. The property also can send the rebate check as a form of payment directly to the contractor who performed the work. If that is the case, the property owner or manager should indicate so on the Statement of Completion (Appendix F).

9. Fill out LIFT survey

MCE will ask LIFT program participants to complete a pre- and post-treatment survey or interview to evaluate the program. MCE's EM&V partner will incorporate these results into LIFT's interim and final evaluation reports, which will be submitted to the CPUC as part of LIFT's reporting requirements.

VI. ELIGIBILITY

A. MCE Service Area

MCE's LIFT program is available to all income-eligible multifamily buildings within MCE's service territory.

MCE's service area has expanded since its initial LIFT proposal was submitted to the CPUC. Currently, it includes Marin and Napa Counties, unincorporated Contra Costa and Solano Counties, and the Cities and Towns of Benicia, Concord, Danville, El Cerrito, Lafayette, Martinez, Moraga, Oakley, Pinole, Pittsburg, Pleasant Hill, Richmond, San Pablo, San Ramon, Vallejo and Walnut Creek. Effective April 2022, the city of Fairfield will also be enrolled in MCE service.

¹⁰ Participants who receive heat pumps will be provided with ongoing support and troubleshooting to ensure they understand the potential impact of the added load on their electricity bills.

¹¹ The Statement of Completion is a form signed by the property owner/ manager agreeing that the measures installed meet the Minimum Performance Requirements set out by the Program Implementer. The form also informs MCE who will be the rebate check recipient and the warranty period for the measures installed by the contractor.

B. Tenants at or below the 200%¹² Federal Poverty Guidelines

To be eligible for LIFT incentives, individual residents must be at or below the 200%¹³ Federal Poverty Guidelines (FPG) and living in a multifamily building with 5 or more dwelling units. To certify eligibility for individual residents, MCE will determine income eligibility according to Table 2, below.

Table 2: LIFT Income Eligibility	
Number of persons in household	Total gross annual household income*
1–2	\$34,840 or less
3	\$43,920 or less
4	\$53,000 or less
5	\$62,080 or less
6	\$71,160 or less
7	\$80,240 or less
8	\$89,320 or less
9	\$98,400 or less
10	\$107,480 or less
For each additional person, add	\$9,080
*Before taxes based on current income sources Valid through May 31, 2022	

C. In-Unit and Common Area Treatment

The LIFT program only provides in-unit incentives except for common area electrification. All other common area measures can receive rebates through MCE's Multifamily Energy Savings (MFES) Program. However, if a property exhausts the \$1,200 per unit LIFT incentive for energy efficiency measures, the MFES Program may provide incentives for any remaining in-unit energy savings measures.

D. Income Qualifying All Resident Units at a Property

MCE's LIFT Program will treat all the units at a multifamily building when 65% (deed-restricted properties) or 80% (NOAH¹⁴ properties) of all units are income-qualified via owner affidavit or individual unit verification.¹⁵

¹² Pursuant to [SB 756](#), the income eligibility threshold for ESA will increase to 250% FPL as of July 1, 2022. This change will also apply to the LIFT program after July 1, 2022.

¹³ *Ibid.*

¹⁴ Naturally Occurring Affordable Housing (NOAH).

¹⁵ Pursuant to D.21-06-015.

E. Documentation

To ensure a property is eligible for LIFT incentives, AEA must review income documentation. The income verification can be conducted at the property owner level or the unit level. Refer to Appendix D (Resident Certification Form) to this Program Manual for a list of documentation needed to verify income eligibility at the resident level.

- i. Property Owner/ Manager level: AEA will work with property owners or managers to determine if the residents can be enrolled using the owner affidavit process (where the owner submits an affidavit form along with other necessary documentation).
- ii. Unit level: When a property owner/manager is unable to execute an owner affidavit, the property owner/manager has the option to income verify residents at the unit level using either a Resident Certification Form (Appendix D) or a Self- Certification Statement Form (Appendix E).

VII. REPORTING

A. Savings Attribution

LIFT-eligible projects may receive rebates from MCE's MFES and LIFT programs; however, only one program can incentivize any single measure. The technical assistance provider will help the property owner determine whether MCE's MFES or LIFT would be the best option to leverage for each measure in their Scope of Work.

B. Reporting Schedule

i. Monthly Reports

Monthly reports will be submitted to CPUC Energy Division on the 1st of every month. MCE will also serve the monthly reports on the ESA proceeding service list (A.19-11-003 *et al.*). The following items will be included in the report:

- a) Budget and expenditures
- b) Committed Rebates
- c) Participating unit count
- d) Households treated by County
- e) Annual Energy and Demand Savings (kWh)
- f) Annual Gas Savings (therms)
- g) Number of heat pumps installed

ii. Quarterly Reports

In addition to the monthly reports to CPUC staff, MCE will report the same information on a quarterly basis. If the Multifamily Project Coordination Group (PCG) restarts, MCE will report to it on a quarterly basis.

iii. **Interim and Final Reports**

MCE will produce an interim report and a final report. These reports will include an evaluation of pilot performance and achievements based on the program metrics provided in Appendix A to this Program Manual. The interim progress report and the final report will be submitted to the Commission on May 1st, 2022 and May 1, 2024 respectively. These reports will be submitted to CPUC staff, the multifamily PCG (if active), and the ESA proceeding service list (A.19-11-003 *et al.*). The final report will be followed by a workshop to discuss the program results.

APPENDIX A: LIFT Pilot Multifamily Barriers and Metrics Tables

Problem Statement	Market Barriers	Desired Effects/2-Year Vision	Intervention Strategies	Metrics	Baseline	Metric Source	Targets
Programs operating in siloed pots of funding do not deliver comprehensive treatment, missing an opportunity to be cost efficient and to have a higher program participation and satisfaction rate	The design of current low-income programs limits the potential for comprehensive savings while still attaining cost-effective program delivery	Programs are blended to provide maximum benefits to the owners and tenants of multifamily properties while enabling improved program resource efficiency	1. Leverage the LIFT incentives with MCE's Multifamily Energy Savings Program (MFES) rebates to provide maximum benefits to tenants and property owners	1. % of units receiving upgrades from both LIFT and MCE's Multifamily Energy Savings Program (MFES) 2. Average savings per unit for properties participating in LIFT is more than the average savings per unit for PG&E's ESA program 3. % of property owners/managers that rate the ease of participation as high	1. Program Year 1 2. 3.32 MMBTU ¹⁶ saved per unit 3. Program Year 1	1. Program tracking data 2. Program tracking data 3. Post-treatment participant survey data	1. 50% of the total of units treated 2. The average savings per unit for LIFT is higher than the average savings per unit for PG&E's ESA program 3. 80% of participant property owners/managers consider it easy to participate in the program
Income-eligible multifamily renters are apprehensive to share income and personal information and prefer not to participate in the program	The income documentation needed to qualify for low-income programs is complicated and burdensome for Income-eligible multifamily renters	Increasing income-eligible multifamily renter participation	1. Work with County, City and Municipality staff to identify priority communities 2. Engage landlords directly, reducing touch points with the tenant.	1. % of units meeting one or more of the following Environmental and Social Justice (ESJ) Action Plan criteria for ESJ Communities: <ul style="list-style-type: none"> • Predominantly communities of color or low-income; • Underrepresented in the policy setting or decision-making process; • Subject to a disproportionate impact from one or more environmental hazards; and • Likely to experience disparate implementation of environmental regulations and socio-economic investments in their communities. <p>These communities also include, but are not limited to:</p> <ul style="list-style-type: none"> • Disadvantaged Communities, defined as census tracts that score in the top 25% of CalEnviroScreen 4.0, along with those that score within the highest 5% of CalEnviroScreen 4.0's Pollution Burden but do not receive an overall CalEnviroScreen score; • All Tribal lands; • Low-income households; and • Low-income census tracts. <p>2. % of units that belong to communities within MCE service area that have the highest affordability ratio (AR₂₀) in the Commission's most recent annual affordability report</p>	1. Program Year 1	1. Program tracking data	1. 40% of eligible units treated
Income-eligible multifamily renters face	Landlord approval requirements, potential for rent	Increased participation from	1. Targeting landlords and property owners to reach	1. % of the eligible households ¹⁷ that install energy efficiency measures through the LIFT program	1. Program Year 1	1. Program tracking data	1. 150 units (2021), 300 units (2022) and 450 units (2023)

¹⁶ The MMBTU was calculated using the costs and savings data presented in the ESA Table 1 "Overall Program Expenses" and ESA Table 2 "Expenses and Energy Savings by Measures Installed" of the Pacific Gas and Electric Company ESA Program and CARE 2016 Annual Report.

¹⁷ An eligible household is one that meets a Commission-approved ESA eligibility criterion, for example a household income at or below 200% of the federal poverty level (250% starting July 2022).

Problem Statement	Market Barriers	Desired Effects/2-Year Vision	Intervention Strategies	Metrics	Baseline	Metric Source	Targets
higher energy burden and are hard to reach	increases, and lack of incentives	Income-eligible multifamily renters	eligible and hard-to-reach multifamily renters				

LIFT Pilot Heat Pump Barriers and Metrics Table

Problem Statement	Market Barriers	Desired Effects/Pilot Vision	Intervention Strategies	Metrics	Baseline	Metric Source	Targets
Fuel-switching measures are hard to justify as the environmental, and health and comfort benefits are not considered when compared to existing technology	The high upfront cost of fuel substitution and fuel switching owing to current regulatory framework	The full potential of fuel substitution and fuel switching measures is valued and quantified	<p>1. Replace 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</p> <p>2. Demonstrate to landlords, property managers, and tenants the benefits of fuel substitution and fuel switching.</p>	<p>1. # of heat pumps installed</p> <p>2. Gather the following data to support advancement of fuel substitution and fuel switching policies:</p> <ul style="list-style-type: none"> - procurement and installation costs of heat pumps including costs of bulk purchase - the impacts of fuel substitution and fuel switching on bill savings and net costs to the customers - reduction in greenhouse gas (GHG), nitrogen oxides (NOx), and sulfur oxides (SOx) emissions - source British thermal units (BTU) savings - impacts on resident's health, comfort, and safety <p>3. Develop bill impacts over time as a result program intervention, especially highlighting the benefits of fuel substitution and fuel switching, to be used to market the benefits of fuel substitution and fuel switching, energy efficiency and other interventions.</p>	1. Program Year 1	1. Program tracking data	<p>1. 25 in-unit HVAC (2021)</p> <p>2. 2 Central DHW Heat pumps & 25 in-unit HVAC (2022)</p> <p>2. 3 Central DHW Heat pumps & 35 in-unit HVAC (2023)</p>
Lack of tenant education could lead to misunderstanding and misuse of the heat pump technology	Lack of customer knowledge due to the newness of heat pump technology	Tenants understand heat pump technology and know how to operate their new heat pump efficiently	1. Providing tenants with post-installation education on potential bill reductions or associated bill increases when there is added cooling and heating load	1. % of tenants who report an increased understanding of how to operate their heat pumps	1. Program Year 1	1. Post-treatment participant survey data	1. 80% tenants/units treated

APPENDIX B: Owner Intent to Proceed Form
Low Income Families and Tenants Pilot Program (LIFT)

Owner Intent to Proceed Form

The Low-Income Families and Tenants (LIFT) program offers income qualified multifamily owners and tenants an opportunity to save money and electricity while improving quality of life for the residents.

CUSTOMER INFORMATION

<hr/> Name of Property Owner	<hr/> Project ID (Internal use only)
<hr/> Property address	<hr/> City State Zip
<hr/> Organization name	<hr/> PG&E Account Number
<hr/> Total number of dwelling units at property	<hr/> Total number of LIFT eligible units

CONTACT INFORMATION

<hr/> Contact Name	<hr/> Contact Title
<hr/> Contact Phone	<hr/> Contact Email

INTENT TO PROCEED

By signing below, I agree to use best efforts to proceed with my participation and installation of energy efficiency measures in the MCE LIFT Pilot Program (the Program), and I hereby accept the Terms and Conditions. Within 14 business days after the receipt of the Program-provided energy scoping report, I agree to conduct a follow-up call or meeting with MCE Program representatives to discuss the upgrade opportunities. Within 30 days after receipt of the Program-provided report, I agree to proceed with the Rebate Reservation form indicating which measures I intend to install at the property.

If complexities of my project require more time or if unforeseen complexities cause me to withdraw from participation in the Program, I will notify MCE in writing as soon as possible.

- ☐ Check here to confirm the attachment of recent PG&E bills
- ☐ (Optional for Marin County Properties Only) RELEASE OF INFORMATION FOR GREEN AND HEALTHY HOMES INITIATIVE (GHHI) SERVICES. By checking this box, I authorize MCE to share my contact information with its program partner, GHHI Marin County, and its affiliated service providers, to identify any other home repair, accessibility upgrade and/or energy conservation services for which my property may qualify for. I understand that my information is protected from unauthorized use and disclosure under state law and will not be used, disclosed or sold for marketing or any purposes unrelated to the programs and services described herein.

<hr/> Customer Signature	<hr/> Date
<hr/> MCE Program Contact Signature	<hr/> Date

APPENDIX C: Owner Affidavit
Low Income Families and Tenants Pilot Program (LIFT)
Owner Affidavit Form
CUSTOMER INFORMATION

<hr/>	<hr/>
Name of Property Owner	Project ID (Internal use only)
<hr/>	<hr/>
Property address	Organization name
<hr/>	<hr/>
City State Zip	PG&E Account Number
<hr/>	<hr/>
Total number of dwelling units at property	Total number of LIFT eligible units

This document is a self-certification affidavit by property owner, or its authorized agent, affirming that 80% of the units in the building are income eligible to participate in the LIFT Program. By certifying 80% of the units as eligible to participate, the California Public Utilities Commission (CPUC) authorizes all units in the building to participate in the LIFT Program without individual income verification.

I have reviewed the income eligibility requirements for the LIFT Program. _____ **(Initial here)**

As the property owner, or its authorized agent, of the rental property listed above, I certify that the total number of LIFT eligible units set forth above, qualify for the LIFT Program based on the LIFT income eligibility criteria requiring residents in units to be at or below 200% Federal Poverty Guidelines. _____ **(Initial here)**

I certify that 80% of the units in my building are income eligible and thus all the units in my building are qualified for the LIFT Program. _____ **(Initial here)**

I have submitted the necessary documents including MCE's Intent to Proceed form and proof of ownership of the rental property (refer to table below for acceptable documents for proof of ownership) to MCE staff or its authorized contractors. If this self-certification affidavit is completed by an authorized representative, a copy of the document(s) establishing an agreement exists between the property owner and authorized representative has been provided to MCE staff or its authorized contractors. _____ **(Initial here)**

I agree to maintain income records of my residents and understand, that upon request, I may be required to submit these records to the CPUC for the purpose of an audit of the LIFT program. _____ **(Initial here)**

<hr/>	<hr/>
Customer Signature	Date
<hr/>	<hr/>
MCE Program Contact Signature	Date

LIFT Proof of Ownership

Acceptable documents to show proof of ownership

Any of the following may be used for ownership documentation:

- Current loan or mortgage documents;
 - Property tax records or bills;
 - Property insurance;
- Mortgage payment invoices or book;
- Data Quick or similar title search service;
 - Deeds; and
- Current Mobile Home Registration from Department of Housing and Community Development

For more information, please call us at 415-464-6033 or email us at energysavings@mcecleanenergy.org

Low Income Families and Tenants Pilot Program (LIFT)

Resident Certification Form

CUSTOMER INFORMATION

 Name of Property Owner

 Project ID (Internal use only)

 Property address

 Organization name

 City

 State

 Zip

 PG&E Account Number

 Names of the residents in the unit

 Unit Number

 Number of residents in the unit

 Total number of income documents collected

By signing below, I certify, to the best of my knowledge, that the supporting income documents I have provided, to MCE or its program implementers, to verify my income eligibility for participation in the LIFT Program, are accurate and represent my current annual income. Further, I consent to MCE, or its program implementers, disclosing my supporting income documents to the California Public Utilities Commission (CPUC), if the CPUC conducts an audit of this program.

 Resident Signature

 Date

 MCE Program Contact Signature

 Date

For more information, please call us at 415-464-6033 or email us at energysavings@mcecleanenergy.org

LIFT INCOME ELIGIBILITY DOCUMENTATION

Refer to Table 1 and 2 for income types and the supporting documents for each of those income types.

Table 1: Household Income Types

Types of Income considered for LIFT	
Please check all sources of income that apply and submit the supporting documents to MCE	
<input type="checkbox"/> Wages, salaries and commissions <input type="checkbox"/> 401(k) payments or traditional IRA disbursements <input type="checkbox"/> Alimony payments <input type="checkbox"/> Rental income and royalties <input type="checkbox"/> Child support payments <input type="checkbox"/> School grants, scholarships or other aid <input type="checkbox"/> Disability benefits <input type="checkbox"/> Self-employment earnings <input type="checkbox"/> Foster care payments <input type="checkbox"/> Social security payments <input type="checkbox"/> Realized capital gains on assets <input type="checkbox"/> Housing subsidies <input type="checkbox"/> Interest and dividends on assets <input type="checkbox"/> Supplemental Security Income (SSI) payments and State Supplemental Payments (SSPs) <input type="checkbox"/> Food stamps <input type="checkbox"/> Temporary Assistance to Needy Families (TANF) payments <input type="checkbox"/> Gambling/lottery winnings <input type="checkbox"/> Unemployment Benefits Payments <input type="checkbox"/> General Relief/ Cash Public Assistance	<input type="checkbox"/> Monetary gifts (both one-time and recurring) <input type="checkbox"/> Workers Compensation Payments <input type="checkbox"/> Insurance settlements or legal settlements <input type="checkbox"/> Union strike fund benefits <input type="checkbox"/> Pension payments or withdrawals <input type="checkbox"/> Self- certification for cash affidavits <input type="checkbox"/> Bureau of Indian Affairs General Assistance <input type="checkbox"/> Head Start Income Eligible (Tribal Only) <input type="checkbox"/> Medi-Cal for Families (formerly Healthy Families) <input type="checkbox"/> Low-income Home Energy Assistance Program (LIHEAP) <input type="checkbox"/> National School Lunch Program (NSLP) <input type="checkbox"/> Women, Infants, and Children Program (WIC) <input type="checkbox"/> Veterans Administration Benefit payments <input type="checkbox"/> Bureau of Indian Affairs General Assistance
OR ONLY <input type="checkbox"/> CARE verification (if within the last year)	

Table 2: Types of Supporting Documents

Types of Income Documentation	
Type of Income	Documentation
Wages, salaries and Commissions	Copy of customer's payroll check stub(s) OR Federal income tax filing showing gross income OR affidavit from employer (for cash wages only, and only where just one employer)
Alimony or Child Support Payments	Copy of check, bank statement, OR most recent court document stating amount
Disability benefits, Foster Care payments, Unemployment Benefits, VA Benefits, Workers Compensation	Copy of checks stubs OR copy of most recent award letter
Capital or Other gains	Federal Income Tax filing showing capital or other gains
Food stamps	Copy of most recent award letter OR food stamp/cash issuance letter (indicate TANF or General Relief)
Gambling/lottery winnings	Determined on case-by-case basis
General relief	Copy of most recent award letter (Notice of Action) OR copy of un-cashed check(s) OR copy of direct deposit statement(s)
Monetary gifts	Copy of customer's bank statement OR affidavit from gift giver

Proceeds from insurance settlements or legal settlements	Copy of settlement document
Interest and dividend income	Copy of customer's bank statement(s) OR copy of customer's investment statement(s) OR Federal Income Tax filing showing gross income
Pension or 401K payments or Withdrawals	Copy of customer's check stubs OR copy of most recent award letter OR Form 1099R from prior year OR copy of most recent bank statement
Rental income	Tax return (Form 1040, Schedule E, Total Rental Real Estate and Royalty Income or Loss) showing rental income OR copy of rental receipts OR copy of rental agreement specifying rent amount and affidavit from tenant
School grants, scholarships or other aid	Copy of award letter OR copies of cancelled checks
Self-employment earnings	Income statement showing most recent quarterly adjusted earnings plus prior year's tax return (1040 Schedule C, Net Profit or Loss) OR written affidavit from an accountant or applicant
Housing subsidies	Award letter
SSI payments, TANF payments, or Social Security payments	Copy of most recent award letter (Notice of Action) OR copy of un-cashed check(s) OR copy of customer's direct deposit statement
Union strike fund benefits	Copy of benefits payment stub

APPENDIX E: Self-Certification Statement by Resident Form
Low Income Families and Tenants Pilot Program (LIFT)
Self-Certification Statement by Resident Form

CUSTOMER INFORMATION

Name of Property Owner

Project ID (Internal use only)

Property address

Organization name

City State Zip

PG&E Account Number

Name of the resident in the unit

Unit Number

Number of people in household

Total number of households in unit

This document is a self-certification statement by the above-listed resident affirming their eligibility for the LIFT Program based on the LIFT income eligibility criteria requiring residents in units to be at or below 200% Federal Poverty Guidelines.

I have reviewed the income eligibility requirements for the LIFT Program. _____ **(Initial here)**

I certify that my household income qualifies for the LIFT Program based on the income eligibility requirements. _____ **(Initial here)**

I have submitted the necessary documents including MCE's Intent to Proceed form to MCE staff or its authorized contractors. _____ **(Initial here)**

I agree to maintain income records to support this self-certification and understand, that upon request, I may be required to submit these records to the CPUC for the purpose of an audit of the LIFT program.
_____ **(Initial here)**

I consent to MCE sharing this self-certification form with the property owner, or its authorized representative, listed above, for the purpose of enrolling all units of the building. _____ **(Initial here)**

Customer Signature

Date

MCE Program Contact Signature

Date

For more information, please call us at 415-464-6033 or email us at energysavings@mcecleanenergy.org

APPENDIX F: Statement of Completion Form

Multifamily Energy Savings Program and Low Income Families and Tenants (LIFT) Pilot

Statement of Completion

CUSTOMER INFORMATION

Name of Property Owner

Project ID (Internal use only)

Property address

Organization name

City State Zip

PG&E Account Number

Total number of dwelling units at property

Total number of LIFT eligible units (Internal use only)

INCENTIVE DISBURSEMENT

Please send the final incentive payment of

\$

Entity receiving incentive (check one):

☐ Owner

☐ Contractor

Make Check payable to:

Rebate recipient address

City

State

Zip

STATEMENT OF COMPLETION

By signing below, both the owner and contractor certify that all of the work in the attached proposal has been completed to program standards and is covered by a one-year warranty on all parts and labor effective as of the date listed below. The owner and contractor are in agreement that the final incentive payment should be sent to the recipient and location listed above.

Customer Signature

Date

FUTURE CASE STUDIES

- ☐ By checking here, I express interest in having MCE contact me to develop case study material based on my successful energy efficiency project.

Attachment B to MCE Advice Letter 56-E

Updated LIFT Evaluation Plan



MEMORANDUM

Date: December 1, 2021

To: Grace Peralta, Marin Clean Energy

From: Sarah Monohon, Evergreen Economics

Re: Proposed Evaluation, Measurement and Verification Plan for MCE LIFT Pilot

We have planned a series of research activities for 2022-2024 to test whether the LIFT Pilot program is achieving its objectives. The evaluation will explore many unique elements of the program design including:

- The impacts of the inclusion of heat pumps;
- The persistence of energy savings (from LIFT measures installed in the first iteration of the pilot);
- The process efficiencies of blending the LIFT Pilot with the multifamily program;
- The participant experience, engaging property managers instead of going directly to tenants; and
- The ability of the program to address barriers including the lack of access to and benefits of electrification measures for low-income households, and the multifamily split incentive problem.

Proposed Activities:

The evaluator will take on the following activities:

- **Literature review** to identify any additional measures or programs from which MCE can learn.
- **Program tracking and data review** to characterize program participants, quantify the incentive leveraging between MCE's Low-Income Families and Tenants (LIFT) and the Multifamily Energy Savings (MFES) programs, and estimate costs;
- **Billing analysis of savings impacts**, alternative rates, and persistence of savings;
- **Tenant interviews** to assess outreach, ease of participation, remaining barriers, and comfort/satisfaction with measures from the tenant perspective;
- **Property owner/manager interviews** to assess ease of participation and remaining barriers; and



- **Contractor in-depth interviews** to help identify barriers to education and options for scaling the program.

The following table shows how each of these EM&V tasks will contribute to the specific objectives and research topics that are needed. The evaluation will produce sufficient information to calculate all the key performance metrics identified in Section XX, while also providing MCE with insights from qualitative research on the program process; assessing the alignment between the program theory and the actual program implementation.

Table 1: EM&V Tasks Mapped to Research Topics and Objectives

	Literature Review	Program Tracking Data Review	Billing Analysis	Tenant Surveys	Property Owner/ Manager Interviews	Contractor Interviews
Heat Pump EM&V						
Fuel substitution and fuel switching	●					
Procurement and installation costs of heat pumps		●				
Cost savings due to avoided gas infrastructure and Combustion Appliance Safety testing	●	●				
Fuel switching impacts on bill savings and net costs or savings to customers			●			
GHG emissions, nitrogen oxides, and sulfur oxides reductions	●					
Tracking source BTU savings	●					
Impacts of alternative rate structures such as TOU and electric heating baseline adjustment rates			●			
Energy Efficiency EM&V						
Energy savings and bill impacts of program participants			●			
Persistence of energy savings			●			
Benefits of blending the LIFT Pilot with the MFES program		●		●	●	
Ease of participation for tenants and property owners				●	●	
Success of program outreach to priority communities				●		
Program Barriers						
Identifying LIFT Pilot program and industry barriers for property owners, tenants, and contractors				●	●	●
Tenant turnover				●	●	
Best practices scaling and incorporating into an ongoing program	●	●		●	●	●
Other Metrics						
% of units receiving upgrades from both programs		●				

	Literature Review	Program Tracking Data Review	Billing Analysis	Tenant Surveys	Property Owner/ Manager Interviews	Contractor Interviews
Average savings per unit compared to PG&E ESA		●				
Property owner/manager rating of ease of participation					●	
% of units meeting one or more of the following ESJ Action Plan criteria for an "Environmental and Social Justice Communities" or "ESJ Communities" (40%)				●		
% of eligible households that install measures (1%)		●				
% of residents who report comfort and satisfaction with heat pump technology				●		



Below we expand on each of the evaluation activities and discuss how they will connect to the broader research areas of the program.

Program Tracking and Data Review

Program tracking data will be used to investigate the procurement and installation costs of heat pumps in addition to possible cost savings due to avoided gas infrastructure and appliance safety testing. In addition to asking participants about other program participation as part of the property owner/manager interviews (see #4), we will review customer data to identify any other programs they have participated in since their participation in the pilot. The evaluator will also review program marketing material to better understand how the LIFT and MFES programs are delivered together and how property owners and managers are able to inform themselves about the program. This data will also help to measure the number of units receiving upgrades from both programs and assess the percent of total eligible units that have participated in the pilot.

In order to understand if the program is working with priority communities, the evaluation will include an analysis of Census PUMS data to compare a population estimate of eligible households to then compare to program participation. While this cannot be compared to other programs, it will identify if participation is proportionally representative of the identified priority communities.

Billing Analysis

The billing analysis will look at program impacts, the use of existing alternative rates (including MCE's Light, MCE's Deep Green, and PG&E's all-electric rate), and the persistence of savings at sites with electrification measures. MCE will collect information about any other programs that are being leveraged as part of this effort.

Tenant Surveys

MCE will work closely with a third-party evaluator to collect field surveys from a representative sample of program participants. The surveys will gather information related to the participation processes, barriers to participation, the effect of alternative eligibility criteria, and the use of trusted messengers. This information will be analyzed to determine the effect of the LIFT pilot strategies on willingness to participate.

Property Owner/Manager Interviews

Property owner/management recruitment is a core strategy of this pilot, reducing the burden on tenants and removing key barriers to participation. The evaluator will interview property owners/managers to understand the success of this recruitment approach. MCE's third-party evaluator will ask property owners/managers about ease of participation, the benefits of



layering multiple programs, issues of tenant turnover, interactions with program staff and trade allies (MCE, AEA, and contractors), as well as general satisfaction with the program.

Contractor In-Depth Interviews

The evaluator will conduct interviews with program contractors to help understand how the program is promoting electrification more broadly within the workforce. We will discuss any trainings that occurred and the contractor experience with MCE program engagement.

EM&V Target Data to Capture

The LIFT program will gather the information required for reporting under MCE's existing EE programs for participant level data, building level data, and measure level data. Evaluation of the LIFT pilot program will include collection of the following additional data.

- Participant Level Data:
- Income-Qualification
- Tenure in Home
- Prior Program Participation
- Primary Language
- Referrals to Other Programs (e.g., CARE)
- Building Level Data
- Record of Health and Safety Issues and Resolutions
- Referrals to MCE's MFES Program
- Collecting EM&V Program Tracking Data

Program staff will collect a portion of the participant level data at the time of program enrollment and the rest of the participant level data once the LIFT project is completed. The data collected at the time of enrollment will depend on the type of project and the comfort of the participant.

Definition of Success

This evaluation will measure success using the program metrics are outlined below:

1. % of units receiving upgrades from both LIFT and MFES
2. Average savings per unit compared to PG&E ESA
3. % of property owners/managers rating of ease of participation as high



4. % of units meeting one or more of the ESJ Action Plan criteria for “Environmental and Social Justice Communities” or “ESJ Communities”
5. % of units that belong to communities within the MCE service area that have the highest affordability ratio (AR20) in the Commission’s most recent annual affordability report
6. % of eligible households that install measures through the LIFT program (1% target)
7. % of tenants who report an increasing understanding of how to operate their heat pumps

As part of this evaluation, a literature review will be conducted to review of best practices for multifamily programs and to assess if there are additional metrics that should be tracked.

EM&V Dates and Deadlines

An interim progress report and a final report will be submitted to the Commission on May 1st, 2022 and May 1, 2024 respectively. Evergreen Economics will also submit an interim findings report to MCE in May 2023. MCE will use the interim progress report and the interim findings deliverable to monitor and disseminate early results about the program. MCE will use these reports to guide program decisions and influence any modifications necessary.

Attachment C to MCE Advice Letter 56-E

Updated Monthly and Quarterly Reporting Templates

MCE

Monthly Report of MCE on Its LIFT Pilot Program

Pilot Program Launch Date: Oct. 31, 2017

Report Month: [Month, Year]

LIFT Monthly Report Number: [Number]

Table 1. Budget and Expenditures¹	Total
Annual Approved Program Budget	
Expenditures (Report Month)	
Admin	
Direct Implementation	
Marketing & Outreach	
EM&V	
Expenditures (Pilot-Launch-to-Date)	
Admin	
Direct Implementation	
Marketing & Outreach	
EM&V	
Committed Rebates	
Available Budget as of Report Month	

¹ Monthly report expenditures are estimates based on information available at the time of reporting. Pilot-launch-to-date expenditures are true-up, as necessary, in future monthly and quarterly reports.

Table 2. Pilot Savings²	Savings Goals	Actual Savings- Report Month	Actual Savings - Pilot Launch through Report Month	Projected Savings- Report month	Projected Savings - Pilot Launch through Report Month
Annual Energy Savings (kWh)					
Annual Demand Savings (kW)					
Annual Gas Savings (therms)					

² Pilot savings above do not include savings associated with heat pump pilot measures. Reported therms savings are associated with non-heat pump measures such as showerheads, aerators, etc. Savings associated with heat pump pilot measures will be reported at completion of the pilot. Actual Savings - Report Month represents total savings for measures that had an installation date in the report month. Actual Savings - Pilot Launch to Date represents total savings for all completed installs to date. Projected savings follow the same logic, except for that they are based on the Rebate Reservation date and therefore represent expected savings.

Table 3. Installed EE Measures ³	Quantity
Smart Thermostat	
LED Bulbs	
LED Fixtures	
Energy Star Refrigerators	
Duct Sealing/Replacement	
Attic Insulation	
Wall Insulation	
Roof Insulation	
Showerheads	
Bath Faucet Aerators	
Kitchen Faucet Aerators	
Windows	
Crawlspace Insulation	
Washer	
Energy Star Water Heater	
Tankless Water Heater	
Inverter Driven Split/PTAC Air Conditioner	

Table 4. Installed Electrification Measures	Quantity
Electrical Panel Upgrade	
Electrical Conduit	
Ductless Mini Split	
Central Heat Pump	
Package Terminal Heat Pump (PTHP)	
Ducted Split Heat Pump	
Central Domestic Hot Water	
Rooftop Packaged Heat Pump	
Induction Stove	
Heat Pump Dryer	

³ These measures will be installed, as appropriate, before offering additional measures using LIFT funds.

Table 5. Treatment	Units Treated through Report Month	Households Treated through Report Month	Properties Treated Through Report Month
County	Total	Total	Total
Marin			
Contra Costa			
Napa			
Solano			
Total			

Table 6. Metrics Tracking⁴	Report Month	Pilot Launch through Report Month
Number of participating units ^{5 6}		
Number of participating properties		
Number of properties expected to install heat pumps		
Number of heat pumps in rebate reservation		
Number of heat pumps installed		

⁵ Some or all of these units may be receiving additional rebates through LIFT and/or MCE's Multifamily Energy Savings Program.

⁶ A participating unit is generally defined as a unit that has passed the income-qualification process, paid a refundable Good Faith Deposit, and received a site assessment from the program's technical assistance provider. However, because MCE applies the 65%/80% ESA-eligible tenant multifamily household eligibility rule, if at least 65%/80% of units at a given property qualify as income-eligible, MCE treats all units at that property. The 65% threshold applies to deed-restricted affordable housing properties and the 80% threshold applies to non-deed restricted properties. Thus, for properties that satisfy the 65%/80% rule, the total number of participating units equals the total number of units at the property (i.e. both income-eligible units and units that do not meet the income eligibility requirements, but are located at a property where 65%/80% or more of the units are income-qualified).

Marin Clean Energy
Quarterly Report of Marin Clean Energy on Its Low Income Families and Tenants Pilot Program
Pilot Program Launch Date: October 31, 2017
Report Quarter: [Quarter, Year]
Report Date: [Date]

Table 1. Budget and Expenditures	Total
Annual Approved Program Budget	
Expenditures (Quarter)	
Admin	
Direct Implementation	
Marketing & Outreach	
EM&V	
Expenditures (Pilot launch-to-date)	
Admin	
Direct Implementation	
Marketing & Outreach	
EM&V	
Committed Rebates	
Available Programs Budget as of Report Quarter	

Table 2. Pilot Savings¹	Savings Goals	Actual Savings - Report Quarter	Actual Savings - Pilot Launch through Report Quarter	Projected Savings - Report Quarter	Projected Savings - Pilot Launch through Report Quarter
Annual Energy Savings (kWh)					
Annual Demand Savings (kW)					
Annual Gas Savings (therms)					

¹ Pilot savings above, do not include savings associated with heat pump pilot measures. Reported therms savings are associated with non-heat pump measures such as showerheads, aerators, etc. Savings associated with heat pump pilot measures will be reported at completion of the pilot.
Actual Savings - Report Quarter represents total savings for measures that had an installation date in the report month. Actual Savings - Pilot Launch through Report Quarter represents total savings for all completed installs to date. Projected savings follow the same logic, except for that they are based on the Rebate Reservation date and therefore represent expected savings.

Table 3. Installed EE Measures²	Quantity
Smart Thermostat	
LED Bulbs	
LED Fixtures	
Energy Star Refrigerators	
Duct Sealing/Replacement	
Attic Insulation	
Wall Insulation	
Roof Insulation	
Showerheads	
Bath Faucet Aerators	
Kitchen Faucet Aerators	
Windows	
Crawlspace Insulation	
Washer	
Energy Star Water Heater	
Tankless Water Heater	
Inverter Driven Split/PTAC Air Conditioner	

Table 4. Installed Electrification Measures	Quantity
Electrical Panel Upgrade	
Electrical Conduit	
Ductless Mini Split	
Central Heat Pump	
Package Terminal Heat Pump (PTHP)	
Ducted Split Heat Pump	
Central Domestic Hot Water	
Rooftop Packaged Heat Pump	
Induction Stove	
Heat Pump Dryer	

² These measures will be installed, as appropriate, before offering additional measures using LIFT funds.

Table 5. Treatment	Units Treated through Report Quarter	Households Treated through Report Quarter	Properties Treated Through Report Quarter
County	Total	Total	Total
Marin			
Contra Costa			
Napa			
Solano			
Total			

Table 6. Metrics Tracking³	Report Quarter	Pilot Launch through Report Quarter
Number of participating units ⁴		
Number of participating properties		
Number of properties expected to install heat pumps		
Number of heat pumps in rebate reservation		
Number of heat pumps installed		

³ Some or all of these units may be receiving additional rebates through LIFT and/or the Multifamily Energy Savings Program.

⁴ A participating unit is defined as a unit that has passed the income-qualification process, paid a refundable Good Faith Deposit, and received a site assessment from the program's technical assistance provider.