

Prospectus for CAEECC Equity & Market Support Working Group (EMSWG)

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*This Prospectus is expected to be updated periodically based on conversations with the Working Group participants, Energy Division, and the Program Administrators.²

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Working Group Background and Charge

The charge of this Working Group is to address certain outstanding topics within the Equity and Market Support segments. We will be referring to this Working Group as a single consolidated group, recognizing it will be made up of members drawn from both the past Equity and Market Support Metrics Working Groups who may elect to focus on

¹ Updated on September 27, 2023 based on feedback received at the Q3 Full CAEECC Meeting held on September 20, 2023. Updated on October 4, 2023 at Energy Division’s request and to clarify the facilitation team’s proposed phased approach. Updated October 26-27, 2023 for clarity and grammar. Updated December 19, 2023 to reflect discussions in Meetings #1-3 of the Equity & Market Support WG and discussions in the Q4 Full CAEECC meeting.

² Program Administrators are discussing how they will meet the requirements of D.23-06-055 that overlap with the charge of this Working Group. To avoid duplicative efforts, this Working Group will coordinate its scope of work and tasks with Program Administrators.

Equity or Market Support metrics solely, as well as members that may contribute to both.

Background

In 2021, CAEECC hosted an [Equity Metrics Working Group](#) and [Market Support Metrics Working Group](#).

In 2022, CAEECC briefly reconvened each Working Group for a series of “huddles” in preparation for an [Ad Hoc CPUC Workshop](#) (facilitated by CAEECC) on Indicators, Metrics and Targets.

Working Group Charge

In June 2023, CPUC Decision ([D.23-06-055](#)) addressed and adopted a number of recommendations from the Working Groups. The Decision also flagged topics for CAEECC to reengage the Working Groups on, which we’ve sorted below by Required/ordered and Optional Activities.

Note: Per the language below, the Decision speaks only to Indicators. The Metrics Working Groups recommended Metrics *and* Indicators. The Commission language recognizes 70 Indicators (actually converting some recommended Metrics back to Indicators, consolidating, and adding some new ones). Inclusion of only Indicators in the Decision was based on the definition that Metrics require Baselines and Targets, and since none of the Indicators (or Metrics for that matter) have Baselines, Targets, or even Methodologies, the CPUC is treating all as Indicators. Metrics may arise from the pool of Indicators to the extent they demonstrate progress toward Market Support and Equity goals and are given Baselines and Targets in the future (which may be beyond the Working Group process).

The Decision adopted 13 Equity Indicators, and 25 Market Support Indicators, and an additional 17 Market Support Indicators structured around the Awareness, Knowledge, Attitude, and Behavior (AKAB) surveys. The Decision is asking CAEECC to convene the Metrics Working Groups for the 13 Equity Indicators and 25 Market Support Indicators. It explicitly marks the 17 AKAB Indicators as optional for CAEECC.

Required Activities

Ordering paragraph 11: Taking into account recommendations of the California Energy Efficiency Coordinating Committee working groups on equity and market support metrics, “[t]he portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 **clarifying all of the Indicators adopted in this decision, including any modifications from metrics and Indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines.**”

Furthermore, the Decision language provides additional details and context: “Many of the **adopted Indicators would benefit from clarification and further discussion about the valuation methodology**. Guidance may be needed for PAs to ensure that baselines for target-setting are clear and consistently applied, to the greatest extent possible. For these reasons, we will ask the CAEECC to re-engage and update, as necessary, the EMWG and MSMWG to discuss and develop recommendations” ([D.23-06-055](#) section 5.2, PDF page 29)

Optional Activities

As decided in the Q3 Full CAEECC Meeting, the Equity and Market Support WG self-determined whether or not to address the following topics:

- **Common Metrics Update**, particularly any recommended to be removed from tracking that have not been used and/or may no longer be relevant or useful. Recommendations for metric removal, suspension, or modification should be included in the same Indicators **Advice Letter due May 1, 2024**. ([D.23-06-055](#) section 5.2, PDF page 29)
- **Awareness, Knowledge, Attitudes, and Behavior (AKAB) Indicators**. Clarification and specificity recommendations by the Metrics WGs, to be included in a Tier 2 **Advice Letter due August 1, 2024**. ([D.23-06-055](#) section 7.9, relevant text on PDF page 72)
- **Equity & Market Support Goals**.³ – This item is categorized as an Optional Activity for the Working Group to address, at the request of Energy Division. Given the deadline for this topic (TBD in 2026), however, it is expected that discussions would not begin until after March 2024, when the Required Activities are completed. Expected discussions include:
 - a. Recommended priorities for a) Higher level goal development; b) Options for goal constructs, methods, metrics, timeframes, quantification approaches, stakeholder engagement, process, procedure, enforcement, studies, or other element of goal development; c) Indicators that could be converted to metrics with targets to reach goals.
 - b. Feedback on a) PA goal constructs and proposed process; b) PA Tier 3 Advice Letters

During the Q4 Full CAEECC Meeting scheduled for November 29, 2023, CAEECC members discussed whether to update the Prospectus to indicate that Working Group Members will address the following issues in this Working Group in a Phase II or in another forum/venue.

- Goals for the Equity & Market Support Segments – due next portfolio application due sometime in 2026

³ Included as an Optional Activity at the request of Energy Division.

- Community Engagement Indicators - Advice Letters due September 1, 2025
- Reporting Demographic Participation Data - Reporting Policy Coordination Group submits Report by September 1, 2025
- Objectives for the Equity & Market Support Segments – due next portfolio application due sometime in 2026

Approach

Given the broad scope that this working group could address, we plan to divide the work up into at least two phases, described below.

Phase I: October 2023 - March 31, 2024

This work will focus on identifying information that could be used as baselines for energy efficiency program metrics, methods for establishing baselines, and valuation methods for indicators that have already been adopted by the CPUC. Metrics and/or indicators may be removed but are unlikely to be added to the portfolio during this Phase. Expected activities include:

- Clarifying definitions for key terms used in Indicators.
- Developing and/or reviewing recommended methodologies for some Indicators; the scope of discussion will depend on priorities identified by the WG and interested members of the public and the time available for discussions.

Optional Activities: The WG determined the following regarding Optional Activities:

- Common Metrics - Advice Letter due May 1, 2024 (same timeline as Required Activities) → The WG elected not to address Common Metrics.
- Awareness, Knowledge, Attitudes, and Behavior (AKAB) Indicators - Advice Letter due August 1, 2024 → The WG expressed interest in discussing AKAB Indicators; however, the scope of discussion was not specified.

Phase II: Beginning around or after March 2024

During the Q4 Full CAEECC Meeting held November 29, 2023, CAEECC members discussed whether to update the Prospectus to include a scope of issues to be addressed in a Phase II or in another forum/venue. CAEECC members decided the following:

- **Goals for the Equity & Market Support Segments** – due next portfolio application due sometime in 2026 → This will be addressed in Full CAEECC meetings rather than in the Equity & Market Support WG.

- **Objectives for the Equity & Market Support Segments** – Objectives for the Equity & Market Support segments have already been adopted by the Commission. Further discussion, if needed, may be held in Full CAEECC meetings rather than in the Equity & Market Support WG.
- **Community Engagement Indicators** - Advice Letters due September 1, 2025 → This will be addressed in a Phase II of the Equity & Market Support WG. A distinct recruitment process will be held to bring in diverse and experienced perspectives.
- **Reporting Demographic Participation Data** - Reporting Policy Coordination Group submits Report by September 1, 2025 → This will not be addressed in a Phase II of the Equity & Market Support WG; however, it may be addressed by a different sub-group of CAEECC members and discussed further at Full CAEECC meetings.

Working Group Strategies

Equity vs. Market Support Working Groups

Orientation to this combined Working Group process will include Equity and Market Support Working Group members. Detailed work will be divided up by each segment, or cross-cutting.

Identification of Priority Indicators and Issues

Given the broad scope of potential issues and technical nature of discussions, WG members will be asked to identify priority Indicators and issues for discussion at WG meetings. Facilitators and WG members recognize that WG discussions may not clarify the entire scope of issues necessary to enable Program Administrators to consistently report on all Indicators.

Timeline

Timeline Considerations for Required Activities

PAs must file a Tier 2 Advice Letter by May 1st, 2024 “clarifying all of the Indicators adopted in this decision (including any proposed metrics converted to Indicators as adopted in Decision 18-05-041), and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines” (see Ordering Paragraph 11).

Thus the WG needs to wrap up by March 31st, 2024 so that PAs have a month to incorporate the WG recommendations into their Advice Letter(s).

Meeting Dates & Tasks

As illustrated in the table below, Phase I of the WG process is expected to run from October 2023 – March 2024 (including member recruitment and conveyance of Final Report). The meeting schedule and dates were finalized in coordination with working group participants, Energy Division, and the Program Administrators. All WG meetings and huddles will be convened in a virtual format and will be a maximum of three hours.

Table 1: Phase I Meeting Dates and Tasks

Activity/ Meeting # (max hours)	Proposed/ Approx. Date	Tasks
Draft Prospectus	September 20, 2023	CAEECC Members review Draft Prospectus for approval, including decisions on or delegation of Optional tasks.
Recruitment	September 21 - October 18, 2023	<ul style="list-style-type: none"> - Consult with the Evolving CAEECC Working Group on recruitment approach⁴ - Invite past WG members - Invitation via CAEECC Listserve for additional members
Huddle (3 hours)	November 1, 2023	<ul style="list-style-type: none"> - Discuss relevant background - Introduce scope of issues - Discuss PA Work Plan
Meeting #1 (3 hours)	November 7, 2023	<ul style="list-style-type: none"> - Continue discussion of scope of issues - Discuss Working Group process and timeline
Meeting #2 Equity Indicators (3 hours)	December 5, 2023	<ul style="list-style-type: none"> - Discuss key definitions used in Equity Indicators - Discuss other priority issues related to Equity Indicators - Finalize Work Plan
Meeting #3 Equity Indicators	December 6, 2023	<ul style="list-style-type: none"> - Discuss priority Equity Indicators

⁴ Added based on feedback received during the Q3 CAEECC meeting

(3 hours)		
Meeting #4 Market Support Indicators (3 hours)	January 17, 2024	- Discuss Relationship-related Market Support Indicators
Meeting #5 Market Support Indicators (3 hours)	January 24, 2024	- Discuss Funding-related Market Support Indicators
Meeting #6 (3 hours)	January 31, 2024	- Bike Rack Items – Equity and Market Support Indicators - AKAB Indicators
Report Draft	February 14, 2024	- Facilitation Team consolidates Indicators work and any Optional Activities into a report - Send to WG to review
Meeting #7 Draft Report (3 hours)	February 21, 2024	- Report review and discussion
Meeting #8 Draft Report (3 hours)	February 28, 2024	- Complete review and discussion of Draft Report
Final Report	March 31, 2024	- Convey final report to PAs and ED

Deliverables and Recommendation Delivery

A Report delineating recommendations to PAs regarding:

1. Any clarifications of Indicators adopted in [D.23-06-055 including relevant definitions and methodologies to quantify Indicator data.](#)
2. Other related questions and recommendations the Working Group agrees are necessary to resolve or uplift for further discussion

3. Recommendations/Guidance/Advice pertaining to any Optional Activities

Working Group Adoption Process: Any such recommendations would be made by consensus of the Working Group where possible. Where consensus is not reached, the Report would delineate two or more alternatives including their supporting rationales and list which WG Members support each alternative.

As determined on November 29, 2023, the final recommendations will go directly to the Program Administrators and Energy Division without needing to go back to the Full CAEECC for formal review and approval (which is allowable under the CAEECC delegation Ground Rules if approved by the Full CAEECC).

Expected Use Of Recommendations

The report is expected to be integrated as much as feasible into the PA advice letter to be submitted May 1, 2024 and be reflected in PA proposals regarding indicators, methodology, and any discussion regarding target setting for metrics.

The report may be included in the record to the CPUC to support CPUC disposition on the May 1, 2024 advice letter(s) and any future rulings or decisions regarding or related to Equity and Market Support segment indicators and future metrics.

Working Group Membership

Membership Eligibility: The Working Group will be open to representatives from any CAEECC Member organizations, plus other qualified organizations interested in fully participating. The WG will also be open to the public to observe (and provide input, time allowing).

Recruitment: Notice of the formation of the WG will be emailed to Members of the 2021 and 2022 Metrics Working Groups and huddle participants. In addition, specific groups may be directly recruited by CAEECC for their expertise and experience in the subject matter of the WG.

The WG application process will be open until October 13, 2023. For applicants who have not previously participated in the Metrics working groups or huddles/workshop, facilitators will review applications and choose members in consultation with CAEECC co-chairs and ED, making a final determination and notification of membership by October 18th.

Requirements/Commitment: Member organizations will need to commit to attending all meetings (either by their lead representative or a designated alternate), and to agree to abide by the CAEECC WG Ground Rules (Appendix A). They will also need to commit to pre-and post-meeting work to ensure productive meetings and that a complete

deliverable is finalized in this compressed WG timeline. Volunteer huddles will not be required but members are encouraged to contribute to Huddle work.

Energy Division Staff Role: ED will be an Ex Officio member of the WG.

Compensation: Compensation through CAEECC will not be available to participants.

Facilitation Team

- Katie Wu (Common Spark Consulting) as lead facilitator and Michelle Vigen Ralston (Common Spark Consulting) as supporting co-facilitator.
- Dr Jonathan Raab (Raab Associates) and Katie Abrams (Birch Road Consulting) as facilitation advisors.
- Sooji Yang (Common Spark Consulting) and Susan Rivo (Raab Associates) for facilitation support.

Appendix

Appendix A: CAEECC WG Ground Rules

Reference: [CAEECC Goals, Roles, Responsibilities, and Ground Rules](#)

CAEECC Working Group Meetings –These are dedicated meetings of CAEECC Working Group Members or their proxy/designees whose organizations are interested in specific topics of importance identified by the CAEECC (or the CPUC) for which CAEECC advice or recommendations are sought. The public will be given an opportunity to provide input periodically as time allows and at the discretion of the facilitator.

At Meetings:

1. Commit to attending all WG meetings (either the organization’s lead representative or a designated alternate)
2. Come prepared to discuss agenda items (by reviewing all documents disseminated prior to the meeting, conferring with your organization and other colleagues, etc.)
3. Be forthright and communicative about the interests and preferences of your organization and actively seek agreement if CAEECC recommendations/advice are being sought
4. Be clear so that everyone understands your interests and proposals
5. Be concise so that everyone who wants to provide input has an opportunity to do so
6. Minimize electronic distractions during meetings

Between Meetings:

1. Keep your organizations informed of developments in the CAEECC process
2. Confer with other Members during meeting breaks and in between meetings, as needed
3. Notify the Facilitator Team prior to the meeting (by telephone or e-mail) if you or your alternate cannot attend a meeting
4. Be responsible for actively tracking Facilitator Team and Co-Chair communications as well as relevant proceedings and policies
5. Provide input, feedback, and written material when requested by the Facilitation Team or Co-Chairs in a timely manner
6. Any presenter (Member or their proxy or designee) should have their presentation ready for posting at least five (5) business days prior to the meeting; and presenters should work with the Facilitator Team prior to the posting deadline to help ensure that materials are clear, concise, and on topic

7. Discuss pertinent matters with the Facilitator Team and Co-Chairs when and if the need arises

Substantive Issues (Discussing Issues, Developing Options, and Exploring Agreement)

1. The goal of the process is to fully explore substantive issues by defining options, eliciting constructive feedback, clarifying and narrowing points of divergence, seeking consensus where feasible, and documenting points of convergence and any remaining divergence.
2. During the substantive discussions, if a Member cannot agree to support a substantive option under consideration that member should explain why and propose a specific alternative that he or she can support.
3. Documentation of consensus and multiple options on any particular issue in the Working Group's Final Report would include a clear description of each option and supporting rationale, and include the Members supporting each option. The Working Group Members will review and approve the wording in the Final Report, and those supporting each option on a non-consensus issue will be responsible for drafting the final description and rationale for the option.
4. The Working Group in consultation with the CPUC will determine the most appropriate way to file the Final Report at the CPUC.

Process Issues

1. For process related issues (including setting meeting dates, finalizing agenda designs, etc.) the Facilitator Team in consultation with the Co-Chairs and Energy Division, will have the responsibility to make these decisions.
2. All the other pre-existing CAEECC Facilitator roles and responsibilities will apply.

Non-CAEECC Member Organizations Disclosure

1. Non-CAEECC Member organizations participating in a Working Group are also required to disclose to the Working Group and the Facilitation Team the entities with whom they are currently doing energy-related business with or for, both currently and within the past year. If new such relationships develop during the course of the Working Group, they will update their disclosure.

Virtual Etiquette

1. Log on a few minutes early, if possible, to ensure your technical connection is working
2. Share your video – this fosters engagement and helps mimic an in-person meeting setting
3. Raise your hand to enter the queue to speak—then wait for the Facilitator to call on you
4. Mute yourself when you're not speaking

Appendix B: Links to 2021 CAEECC Metrics WG Materials

Equity Metrics Working Group

- [Working Group Landing Page - All Materials](#)
- [Roster](#)
- [Final Report](#)

Market Support Metrics Working Group

- [Working Group Landing Page - All Materials](#)
- [Roster](#)
- [Final Report](#)

Appendix C: Links to 2022 CPUC Metrics Workshop Materials

- [Ad Hoc Workshop Landing Page - All Materials](#)
- [Meeting Summary](#)
- [Metrics Meeting Mark-up of ED Categorization](#)
- Huddles
 - [Equity Metrics Working Group Huddle](#)
 - [Market Support Metrics Working Group Huddle](#)

Appendix D: Indicators Adopted in CPUC Decision 23-06-055

List of Indicators adopted in [D.23-06-055](#) is included here because the required scope of WG is to add clarity to these Indicators.

Rubric from Decision: Indicators marked with “Q” should be reported quarterly. Those marked with “A” should be reported annually. An “S” means reporting for just the segment, whereas a “P” means reporting for the whole portfolio.

These Indicators can be viewed in Spreadsheet format at: [2023-2024 Equity and Market Support Indicators](#)

Equity Segment Indicators

1. Count of equity target participants in equity segment, by sector (Q, S);
2. Sum of equity target participants’ expected first-year bill savings in equity segment, by sector (Q, S);
3. Count of equity target participants in market support segment, by sector (Q, S);
4. Count of equity target participants in resource acquisition segment, by sector (Q, S);

5. Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment (Q, S);
6. Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment (Q, S);
7. Sum of all equity segment participants' kW savings in equity segment (Q, S);
8. Sum of all equity segment participants' therm savings in equity segment (Q, S);
9. Sum of all equity segment participants' TSB in equity segment (Q, S);
10. Median of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S);
11. Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector (A, P);
12. Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector (A, P);
13. Percent of equity target participants in equity segment, by sector (Q, S);

Market Support Segment Indicators

1. Number of partners by type and purposes (Q, P);
2. Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P);
3. Percent of participation relative to eligible target population for curriculum (Q, S);
4. Percent of total WE&T program participants that meet the definition of disadvantaged worker (Q, S);
5. Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S);
6. Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P);
7. Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P);
8. Prior year percentage of new codes or standards that were previously ETP technologies (A, P);

9. Prior year number of new codes and standards that were previously ETP technologies (A, P);
10. Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P);
11. Number of new, validated technologies recommended to the California Technical Forum (A, P);
12. Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness) (A, S);
13. Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P);
14. Number of unique participants by sector that complete training (Q, S);
15. Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology (A, P);
16. Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P);
17. Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P);
18. Percentage of partners that have taken action supporting energy efficiency by type (Q, P);
19. Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S);
20. Assessed value of the partnership by partners (A, P);
21. Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P);
22. Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P);
23. Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P);
24. Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products) (A, P);

25. Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P);

In addition, as discussed further below in Section 7.9, we will direct the PAs to track **additional market support segment Indicators structured around annual surveys focused on awareness, knowledge, attitude, and behavior (AKAB)**, after the survey process is further developed. Those Indicators are as follows:

1. Percent of customer sample aware of energy efficiency product/service (awareness) (A, P);
2. Percent of customer sample that is knowledgeable of energy efficiency product/service benefits (Knowledge) (A, P);
3. Percent of customer sample that is interested in obtaining an energy efficiency product/service (attitude) (A, P);
4. Percent of customer sample that has taken action towards obtaining energy efficiency product/service (behavior A) (A, P);
5. Percent of customer sample that has obtained energy efficiency products/services (behavior B) (A, P);
6. Percent of market actors aware of energy efficiency products and/or services that can be supplied to customers (awareness) (A, P);
7. Percent of market actors knowledgeable of energy efficient products and/or services that can be supplied to customers (knowledge) (A, P);
8. Percent of market actors that are interested in supplying energy efficient products and/or services to customers (attitude) (A, P);
9. Percent of market actors that have supplied energy efficiency products and/or services to customers (behavior) (A, P);
10. Percent of market actors aware of what is required to perform/ensure quality installation of energy efficient products and/or services that optimizes energy efficiency savings (awareness) (A, P);
11. Percent of market actors knowledgeable of how to perform/ensure quality installation of energy efficiency products and/or services that optimize energy efficiency savings (knowledge) (A, P);
12. Percent of market actors that are interested in performing/ensuring quality installation of energy efficiency products and/or services that optimize energy efficiency savings (attitude) (A, P);

13. Percent of market actors that have performed/ensured quality installation of energy efficiency products and/or services that optimize energy efficiency savings (behavior) (A, P);

14. Percent of market participants aware of capital access opportunities for investments in energy efficient projects, products, and/or services (awareness) (A, P);

15. Percent of market participants knowledgeable about capital access opportunities for investments in energy efficient projects, products, and/or services (knowledge) (A, P);

16. Percent of market participants interested in leveraging capital access opportunities for investments in energy efficient projects, products, and/or services (attitude) (A, P); and

17. Percent of market participants that were unable to take action due to access to capital or affordability of energy efficient projects, products, or services (behavior) (A, P).