



MCE

Residential Direct Install Program

MCE05 & MCE08

Program Manual

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Program Manual Summary

The MCE Single Family and Multifamily Direct Install Program is a third-party program which will deliver electric and gas savings for customers in MCE’s service area. This program manual provides an overview of MCE’s Single Family and Multifamily Direct Install energy efficiency program. It provides an outline of the program’s policies, procedures, and requirements. The manual describes customer and contractor eligibility requirements, audit requirements, services provided, quality assurance procedures, and reporting processes.

1. ELIGIBLE MEASURES

Provide requirements for measure eligibility or a list of eligible measures.

Through deemed and prescriptive measures, the Program will process applications for all energy savings projects claimed through the program term. The proposed list of measures is:

Measures
HVAC
Blower Motor
Refrigerant Charge & Coil Clean
Fan Delay Switch (PSC & ECM)
Duct Sealing
Smart Thermostat
Shell
Attic Insulation

Base Load
Refrigerators
Tier 2 Power Strips
Lighting
Exterior Lighting (LED)
Interior Lighting (LED)
Water
Faucet Restrictor
Low flow shower head (Hand-Held)
Low flow shower head

2. CUSTOMER ELIGIBILITY REQUIREMENTS

Provide requirements for program participation (e.g., annual energy use, peak kW demand)

The Program will identify customers who meet eligibility criteria and associated project qualification requirements. Both the customer and the customer's home must meet eligibility criteria to participate:

- The dwelling where the project is being completed shall be located in MCE's service territory.
- MCE service territory¹ includes all of Marin County and Napa County, unincorporated Contra Costa County and Solano County, and the cities of Benicia, Concord, Danville, El Cerrito, Lafayette, Martinez, Moraga, Oakley, Pinole, Pittsburg, Richmond, San Pablo, San Ramon, and Walnut Creek.
- The dwelling must be located in a Disadvantaged Community (DAC) based on CalEnviroScreen 3.0
- Customer shall be a residential dwelling owner or tenant of a multifamily property who has received permission from the property owner to participate

¹ If MCE service area expands, newly incorporated areas will be eligible for program implementation

- For single-family dwellings, and multifamily properties with up to 4 units, the household annual income must exceed 80% Area Median Income
- For multifamily properties with 5+ units, the household income for a minimum ⅔ of the tenant units must exceed 80% Area Median Income

2019 Income Limits

County Name	Area Median Income	1 Person	2 People	3 People	4 People	5 People	6 People	7 People	8 People
Contra Costa	\$111,700	\$78,200	\$89,350	\$100,550	\$111,700	\$120,650	\$129,550	\$138,500	\$147,450
Marin	\$136,800	\$95,750	\$109,450	\$123,100	\$136,800	\$147,750	\$158,700	\$169,650	\$180,600
Napa	\$100,400	\$70,300	\$80,300	\$90,350	\$100,400	\$108,450	\$116,450	\$124,500	\$132,550
Solano	\$85,700	\$60,000	\$68,550	\$77,150	\$85,700	\$92,550	\$99,400	\$106,250	\$113,100

Customer eligibility will be determined by Program staff based on adherence to Program Manual requirements. The customer eligibility requirements as outlined in the Statewide Energy Efficiency Policy Manual are summarized below:

Public Purpose Program (PPP) Surcharge

Eligible customers must receive electrical or gas service from MCE or PG&E and pay the Public Purpose Program (PPP) surcharge on the gas or electric meter for which the energy efficiency equipment is proposed. The PPP surcharge information can be found on the utility bill.

Minimum Customer or Project Size

Currently, there are no customer or project size limitations or usage threshold requirements to qualify for Program participation.

Double Dipping

The Program team will work with the customer to validate that it has not received incentives or services for the same energy efficiency technologies and measures that it is applying for with the program. MCE and PG&E collaborate via a separate Joint Cooperation Memorandum to ensure that double dipping does not occur from each PA.

The customer Program Application provides the following statements that each participating Customer will validate:

- Customer understands that Customer cannot receive incentives for the same product, equipment or service from more than one California investor-owned utility or third-party Energy Efficiency program offering incentives for the same product, equipment, or service funded by the CPUC.
- Customer understands this prohibition applies three years prior to and three years after receiving the incentives for the same product, equipment or service.

Application Must be Complete

A program application must be signed and dated by contractor and customer and include the full scope of services completed on customer's dwelling. If selected for field inspection, the dwelling must pass field inspection upon initial inspection or following program mandated correction and subsequent inspection.

Projects are subject to all applicable federal, state and local laws, and the California Public Utilities Commission (CPUC) rulings. MCE reserves the right to approve or reject project applications for the Program.

3. CONTRACTOR ELIGIBILITY REQUIREMENTS

List any contractor (and/or developer, manufacturer, retailer or other "participant") eligibility requirements (e.g. specific IOU required trainings; specific contractor accreditations; and/or, specific technician certifications required).

Contractors will be notified of any and all workforce standards during initial engagement in the program. Contractors will be required to accept understanding of the workforce standards on the enrollment agreement prior to ordering and installation of equipment. Contractor will also verify that workforce standards were met as part of the project completion certificate that will be signed upon project completion.

Anticipated workforce standards include:

- Active and Valid State of California Contractor's License
- Building Performance Institute (BPI) or Natural Gas Appliance Testing (NGAT) certification
- Attend mandatory Program Orientation Training
- Attend and Participate in mandatory Field Mentoring Visits

Combustion Appliance Safety

Contractor staff who install measures in a customer's home must maintain a valid and current BPI or NGAT certification to be provided upon Program enrollment and maintained for the duration of the Program term. Contractors will represent and warrant

that all staff who participate in the Program meet participation requirements as defined by MCE and its partners in program documentation.

4. PARTICIPATING CONTRACTORS, MANUFACTURERS, RETAILERS, DISTRIBUTORS

Not applicable: *For upstream or midstream incentive and/or buy down programs.*

5. ADDITIONAL SERVICES

Briefly describe any additional sub-program delivery and measure installation and/or marketing & outreach, training and/or other services provided, if not yet described above

Marketing

BIG's experience with marketing to and acquiring customers based on psychographic and demographic characteristics is comprehensive and effective. BIG will leverage multi-touch campaigns to identify target customers, convert leads, reduce customer churn, and boost customer energy savings' lifetime value. All marketing and customer acquisition efforts will drive customers to the Program.

BIG will design and distribute marketing materials like door hangers, program cut sheets, and Participating Contractor identification badges for use by the Participating Contractor which will include MCE & BIG's logos and BIG's contact information. The program marketing collateral provides a program brand and credibility to build trust.

For the single family program, Participating Contractors will begin their outreach to customers in DACs in Climate Zone 12 who have not received services from other energy efficiency programs. Participating Contractors will utilize door hangers, a program cut sheet, program ID badges, and content on the MCE website to inform customers about the program offerings.

For the multifamily program, BIG will conduct outreach to property owners and property management companies to identify leads to pass along to Participating Contractors. Participating Contractors will complete a measure installation in common areas and individual units in eligible multifamily properties.

While the single family and multifamily program will initially target customers in DACs in Climate Zone 12 with a household income of 80%-120% of the AMI, the program will refer customers with household income below 80% AMI to the Energy Savings Assistance Program and provide customers with an AMI above 120% an option to participate in this program or other currently available market rate programs. Over time, the program will strive to serve as many customers in the MCE service area as is cost effective.

Marketing & Outreach Strategies

Collateral: Participating contractors will leverage marketing materials to inform customers about the program. Where appropriate, some materials will include brand logos from MCE, Build It Green, and the respective contractor. This will support the new program's credibility and improve customer trust. The primary marketing materials are:

- Program cut sheet (Co-Branded)
- Badges (Co-Branded)
- Door Hangers (Co-branded)

Web Content: The Program will use a landing page within MCE's website to inform potential customers and stakeholders about customer eligibility, available measures, and contact information for both BIG and Participating Contractors.

Stakeholder Engagement: BIG will conduct outreach to property owners and property management companies to provide information about program offerings, technical assistance, and contact information for Participating Contractors.

Services Provided:

The Program will deliver downstream energy savings through direct installation of pre-screened energy efficiency measures.

- **No-cost Measures²** - Install pre-screened energy efficient measures in single family homes and multifamily units.
- **Single Point of Contact** – Provide personalized attention, follow-through, and assistance in identifying solutions that meet customers' needs.
- **Assessment** – Household assessments for single family homes and multifamily units to establish measure eligibility and identify potential opportunities to accomplish deeper savings.
- **Energy Education** – The Program will offer energy education resources to help customers understand the benefits of measures installed in their home and guide them through the process of identifying options and resources to adopt more energy saving technologies.

BIG will serve as the Single Point of Contact (SPOC) for the targeted customers as coordinator and primary contact for information related to all program activity. BIG will operate and maintain a customer-facing phone line and e-mail address to provide customers with an understanding of program offerings and receive and respond to customer inquiries and feedback using standardized email templates and talking points. BIG will relay to the Participating Contractor feedback received about their performance and compile for MCE customer feedback regarding program offerings. BIG's Customer Service (CSR) team is highly trained in energy

² The list of measures is available under supporting documentation section 4.

efficiency and will be knowledgeable about the program guidelines. Contractors who participate in the program without speaking with BIG’s CSR team still receive a household assessment and education on other program offerings they could consider as the next step in their energy efficiency journey.

6. Program Payments

The Program is funded by California utility ratepayers under the auspices of the California Public Utilities Commission. Customers are not obligated to purchase any full fee service not funded by this program.

Program Reimbursements

Program funds are available on a first-come, first-served basis until depleted. Reimbursement amounts have been determined based on the expected market potential for cost effective measures and Total Resource Cost calculations. While the Program’s intent is to maintain consistent reimbursement rates throughout the duration of the program, they are subject to change at any time based on budget availability and progress toward goals.

The measures identified below yield deemed savings capable of meeting the Net Impacts and Sub-Program Cost Effectiveness included in the Program Budget and Savings Information. The program will deliver a balanced set of measures to ensure property owners and tenants receive as many measures as is cost effective. The measures and reimbursement amounts are subject to change.

Measure	Reimbursement
HVAC Measures	
Blower Motor	\$450
Refrigerant Charge	\$200
Coil Clean	\$200
Fan Delay Switch (PSC & ECM)	\$300
Duct Sealing	\$350
Smart Thermostat	\$240
Shell Measures	
Attic Insulation (per sq. ft.)	\$1.30
Base Load	

Refrigerators	\$600
Tier 2 Power Strips	\$45
Lighting	
Exterior Lighting (LED)	\$10
LED Bulbs (Interior)	\$10
Water	
Faucet Restrictor	\$8
low flow shower head (Hand-Held)	\$30
low flow shower head	\$30

7. SUB-PROGRAM QUALITY ASSURANCE PROVISIONS

Please list quality assurance, quality control, including accreditations/certification or other credentials

Quality Assurance

Quality Assurance and Quality Control (QA/QC) ensures customer health and safety, work quality, building performance, verifiable energy-efficiency installations and correlated savings. Program QA/QC also enables MCE and its Implementer to evaluate the effectiveness of Program training and provide feedback to Program participants. Consistent standards will be applied whenever possible. QA/QC includes field verifications of randomly sampled projects, customer surveys, and Program participant feedback, as well as corrective measures (as needed). Every Program participant is required to comply with all components of Quality Assurance and Quality Control.

The QA/QC requirements comply and/or align with similar protocols from existing building performance Programs and standards including Building Performance Institute (BPI), California Home Energy Rating System (HERS I and II), and Home Performance with Energy Star (HPwES). Quality Assurance review will be performed on all applications at the Post-Install review in accordance with Program safety and measure standards.

Field Quality Control (FQC)

Field Quality Control (FQC) will select 5% of projects for field inspection. Projects will be inspected by the Program Implementer and/or its subcontractors. Health or safety issues identified during inspections must be corrected before reimbursement payment can be issued to the Customer.

Participating Contractors will receive two free field mentoring sessions in conjunction with the first two completed jobs and may receive up to five (5) free field-mentoring sessions over the duration of the program in conjunction with a FQC inspection.

The FQC verifier may request additional job information such as proposals, recommendations, photos, permits, or customer agreements from the participant who completed the project. The purpose is to allow the FQC verifier to gain an entire picture of the project completed, evaluate how the Test-In information was presented to the Customer, and if a comprehensive list of recommendations (based on Test-In assessment results and industry best-practices) was given.

The program application will be held until the FQC inspection is complete. If field inspection identifies the need for corrective action, payment will be held until corrections are completed and verified by the Implementer or MCE.

Participants must immediately notify customers of hazards found during FQC inspections. Corrections must be completed and proof of correction submitted to the Implementer within seven (7) calendar days. Failure to complete corrections and submit photos may result in disciplinary action and/or fee-based inspections.

Access to Customer Sites

The Implementer shall be responsible for obtaining any and all access rights from customers and other third parties to the extent necessary to perform the Services. The Implementer shall also arrange any and all access rights from Implementer Parties, customers and other third parties in order for MCE and CPUC employees, representatives, designees and contractors to inspect the services.

MCE reserves the right to perform pre and/or post audits to verify information pertinent to the energy efficiency projects. Project audit selection may include consideration of measure eligibility or other factors at the discretion of MCE. This includes confirming counts of installed equipment, confirmation that equipment is functional, confirmation of pre/post operating parameters of equipment or systems, review of processes and/or process documentation, etc.