

ENERGY EFFICIENCY PROGRAMS

**Implementation Plan
Marin County Energy Watch**

Prepared For:

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**Energy Efficiency
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Contents

- Program Overview..... 1
 - 1. Program Budget and Savings..... 1
 - 2. Implementation Plan Narrative..... 2
- Program Description..... 2
- Program Delivery and Customer Services 3
- Program Design and Best Practices 4
- Innovation 5
- Metrics..... 6
 - For Programs claiming to-code savings 6
- Pilots 6
- Workforce Education and Training..... 6
- Workforce Standards 6
- Disadvantaged Worker Plan 7
- Additional Information..... 7
- Supporting Data 7
- Attached Program Manuals 12
 - Program Management Plan..... 12
 - Policies and Procedures Manual..... 12

Program Overview

The Marin Energy Watch Partnership (MEWP) will provide energy efficiency and climate action plan services and support to Marin's public sector including the County, cities, towns, school districts and special districts. MEWP will also engage with the SMB HTR community in the San Rafael Canal area to connect them with 3P efficiency resources. MEWP is a non-resource program.

1. Program Budget and Savings

The CEDARS platform generates summary views of the following information, based on application tables that the PAs upload to CEDARS. The information is organized at the program level and, if applicable, sub-program level to enable multiple cross tabulations and outputs for stakeholders' review and consideration. Programs with subprograms will be displayed at subprogram level and will roll up to a program summary page.

1. Program and/or Sub-Program Name
 - a. Program Name is Marin Energy Watch Partnership
2. Program / Sub-Program ID number
 - a. NA – MEWP is a non-resource program. We have not been provided with a CEDARS ID number
3. Program / Sub-program Budget Table:

3-Year Program Budget	Admin	Marketing	DI	Total
Program and Partnership Administration	\$ 54,300	\$ -	\$ -	\$ 54,300
Public Agency Energy Efficiency Support	\$ -	\$ -	\$ 297,900	\$ 297,900
Public Agency Climate Action Plan (CAP) Support	\$ -	\$ -	\$ 185,700	\$ 185,700
HTR Outreach and Community Connections	\$ -	\$ -	\$ 27,900	\$ 27,900
Total	\$ 54,300	\$ -	\$ 511,500	\$ 565,800

4. Program / Sub-program Gross Impacts Table
 - a. NA – MEW is a non-resource program
5. Program / Sub-Program Cost Effectiveness (TRC)
 - a. NA – MEW is a non-resource program
6. Program / Sub-Program Cost Effectiveness (PAC)
 - a. NA – MEW is a non-resource program

7. Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)
 - a. Non-resource Partnership
8. Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public)
 - a. Public sector and HTR commercial
9. Program / Sub-program Type (i.e., Non-resource, Resource)
 - a. Non-resource
10. Market channel(s) (i.e., downstream, midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.
 - a. Market Channel: downstream
 - b. Intervention strategies: technical assistance and referrals
 - c. Campaign goals:
 - i. CAP Support Subprogram: To provide the technical support that allows public agencies to successfully write and implement community and operations climate action plans. These plans are critical vehicle for ensuring energy efficiency policy development and integration at a local level.
 - ii. Public Agency Energy Efficiency Support Subprogram: To develop and improve staff capacity and support energy efficiency project implementation at public agencies across Marin.
 - iii. HTR Business Support Subprogram: To increase access to services provided to and relationships with HTR business communities in Marin County with the objective of increasing participation in EE resource programs.

2. Implementation Plan Narrative

Program Description

The Marin Energy Watch Partnership's (MEWP) key objectives are to support public agencies to understand energy use and achieve energy savings and to connect local Hard to Reach (HTR) communities to available energy efficiency programs. MEWP offers three overarching programs:

1. **Public Agency Climate Action Plan (CAP) Support.** CAP and greenhouse gas (GHG) inventory support for cities/towns and public agencies.
2. **Public Agency Energy Efficiency Support.** Technical services supporting public sector energy efficiency efforts historically known as the Marin Energy Management Team (MarinEMT).
3. **Empowering HTR Communities.** Energy efficiency support and direct marketing for Marin's hard to reach small businesses.

All three programs serve broader goals of reducing energy use and GHG emissions locally and statewide. MEWP's programs support PG&E in achieving its Business Plan goals by acting as a

pivot point and proven trusted advisor to Marin’s public sector and HTR customers. Specific program goals include:

- Program 1: Public Agency CAP Support
 - To provide the technical support that allows public agencies to successfully write and implement community and operations climate action plans. These plans are critical vehicle for ensuring energy efficiency policy development and integration at a local level.
 - The objectives that support this goal focus on assisting agencies with updating annual GHG inventories and, as necessary, the energy sections of their CAPs and/or Energy Action Plans, and then using this information to leverage future program design and collective action.
- Program 2: Public Agency Energy Efficiency Support
 - To develop and improve staff capacity and support energy efficiency project implementation at public agencies across Marin.
 - Objectives for this program include providing ongoing technical assistance to public agency staff and supporting project identification/implementation. To support integrated energy efficiency projects on an ongoing basis, the program will also have an objective to assist public agency staff to incorporate energy efficiency into standard operating procedures, such as Capital Improvement Programs (CIPs).
- Program 3: Empowering HTR Communities
 - To increase services provided to and relationships with HTR business communities in Marin County with the objective of increasing participation in EE resource programs.

Program Delivery and Customer Services

As a non-resource program, MEWP will focus on building trust and relationships with public sector staff to assist them in identifying opportunities and navigating resource programs and financing opportunities. Through existing networks and established relationships in the community, MEWP will provide a means for PG&E, third-party program providers, and vendors to more cost effectively reach public and HTR sector customers. Specific strategies/tactics and marketing efforts for each program include:

- **Program 1: Public Agency CAP Support**
 - Completion of inventories and CAP energy policies to support the program goals will require:
 - Coordinating with the Marin Climate and Energy Partnership (MCEP – a program of the Marin General Services Authority);
 - Maintaining and updating of inventory tools to incorporate best available data and practices;
 - Collecting necessary data from multiple places;
 - Collaborating with agencies to achieve consistent, scalable energy actions.

- Gathering data for completing inventories
- **Program 2: Public Agency Energy Efficiency Support**
 - Capacity building efforts will focus on connecting energy efficiency trainings for public agencies to technical assistance provided by MarinEMT staff. This will include energy tracking, facility benchmarking, initial project identification and referrals to resource programs.
 - Technical assistance services will support project implementation, connection to financing, ongoing integration of energy efficiency into business practices, and development of ZNE/CIP tools.
 - MarinEMT will work directly with the agency staff that will ultimately select and implement projects. Actors include public works, maintenance, and operations staff.
- **Program 3: Empowering HTR Communities**
 - Partner with local community-based organizations (CBOs) in underserved communities to connect with HTR businesses to educate them on SMB offerings.
 - Direct canvassing and marketing to businesses in HTR communities.
 - Developing and providing translated materials
 - Providing one-on-one support for explaining available programs and application processes.

Program Design and Best Practices

Whether the target group is public sector staff or HTR SMB customers, common barriers to implementing energy efficiency projects are limited bandwidth and continually evolving technologies, resource programs and financing opportunities. It can be difficult for staff and business managers to monitor, understand, trust, and engage with energy efficiency offerings. Since 2004, MarinEMT has demonstrated success in addressing these barriers by offering staff support through long term and trusted relationships. Public agency staff in Marin know that they can count on MarinEMT staff to have the most recent information about programs, and trust that MarinEMT is acting in their best interest. This relationship can and does expand to helping public agency staff find funding and financing assistance to implement available programs. New funding opportunities do not necessarily align with the program cycle, which can confuse and frustrate agency staff. MarinEMT staff monitors funding opportunities, reviews eligibility guidelines and compares that information with identified customers and facilities in our database. This allows MarinEMT staff to get the word out quickly to the appropriate public agencies and contacts to capitalize on opportunities.

Specific best practices for each program include:

- **Program 1: Public Agency CAP Support**
 - Developing policies and programs that could influence local markets and increase uptake of resource programs in all sectors (municipal, residential, commercial and agricultural).
 - Using monthly meetings of agency and MCEP staff to make progress on this program. Public agency staff and decisionmakers are key actors for success of this program, and

MCEP is an integral part of coordinating these players. The group is already very engaged and is eager to receive these services.

➤ **Program 2: Public Agency Energy Efficiency Support**

- Potential customers will be reached by building on existing relationships to generate program referrals and leveraging existing staff and network meetings.
- MarinEMT will bolster local energy efficiency expertise by leveraging PG&E's training offerings and by bringing together facility managers in collaborative learning situations.

➤ **Program 3: Empowering HTR Communities**

- Building upon MEWP's successful public sector model of serving as an owner's advocate for public agencies, employ a similar approach in supporting HTR businesses by meeting them where they are in a way that is mindful of their time and constraints, including language barriers.
- This program is focused downstream, working directly with businesses that have historically had trouble accessing resource programs.

Innovation

Innovative Delivery Approach: Institutionalizing Energy Efficiency Goals & Pathways

To date, MarinEMT has focused on supporting public agencies to complete high value projects, such as LED lighting upgrades, HVAC upgrades and streetlight replacements. This has proven successful and resulted in supporting substantial energy savings. However, as low-hanging fruit opportunities are completed, public agencies need help identifying the long-term plan for their facilities, including energy efficiency, demand response, and distributed generation. This will be achieved via three innovative pathways:

1. **Climate Action Plans for School Districts:** Building on the momentum from our local governments' CAPs, MEMT will offer similar services to interested schools across Marin. This will include modifying greenhouse gas emission inventory tools to better fit school facility needs and develop efficiency policies that allow for continued planning and support for energy savings and climate action in local schools.
2. **Zero Net Energy Facility Pathways:** MEMT will develop template ZNE facility plans and Capital Improvement Plan (CIP) integration forms to help Marin's public agencies develop a long-term plan to achieve zero net energy in specific facilities and develop the CIP-aligned timeline to achieve that goal.
4. **Innovation Spotlight:** To aid in direct outreach and engagement with public works and maintenance staff, MarinEMT will develop case studies of corollary projects in Marin and the broader Bay Area to highlight innovative opportunities for energy savings and tie these to available resource programs.

Metrics

Both the public sector and HTR programs include key performance indicators (KPIs) to track program progress. These KPIs are focused on the number of referrals to resource programs and are designed to set up small public agencies and HTR customers with the tools to identify and implement energy efficiency projects. Each program has KPIs to track progress towards those goals. Specific KPIs include:

- Number of contacts sorted by sector (public and HTR)
- Number of leads/projects referred to resource programs per year (dependent on availability of PG&E resource programs)
- Number of project reports prepared and presented to public agencies
- Number of EAPs or energy sections of CAPs completed
- Number of buildings benchmarked
- Number of GHG inventories completed

During the ramp up period, staff will develop a referral map of available resource programs for public agencies and the HTR community. The success of the programs and associated referral KPIs will be directly dependent on the final resource program offerings.

For Programs claiming to-code savings

Not applicable – MEWP is a non-resource program

Pilots

Not applicable – MEWP does not include any pilot programs.

Workforce Education and Training

MEWP is non-resource public and HTR sector technical assistance and referral program, with most of the work completed by County staff. While direct hiring and workforce development is not part of the program scope, the County will make appropriate connections as feasible when working in HTR communities.

Workforce Standards

MEWP is non-resource public and HTR sector technical assistance and referral program with most of the work completed by County staff. The program does not include any direct install work.

Disadvantaged Worker Plan

MEWP is non-resource public and HTR sector technical assistance and referral program with most of the work completed by County staff. The program does not include any direct install work.

Additional Information

Not applicable

Supporting Data

1. **Program Manuals and Program Rules (See below)**
2. **Program Theory¹ and Program Logic Model²:**

Public Agency Climate Action Plan (CAP) Support

Problem	Reducing emissions from energy use is an essential part of meeting local government GHG emission reduction targets, but staff in small jurisdictions such as Marin often don't have the bandwidth to inventory greenhouse gas emissions annually or research new policies and programs.
Interventions	<ul style="list-style-type: none"> • Through MEWP, annual inventories are completed to help local government staff understand changes in energy use and emissions • Through MCEP, local government climate staff can meet to discuss potential energy saving programs and policies.
Outcomes & Impacts	<ul style="list-style-type: none"> • Complete greenhouse gas inventories and energy action plans with CAPs provide jurisdictions • Collaboration among small jurisdictions provides opportunity for cohesive, clear energy policies in climate action plans, allowing public agencies to work together to amplify energy saving programs across Marin.

Public Agency Energy Efficiency Support

Problem	Public agencies in Marin manage a diverse portfolio of public facilities, but competing priorities, small budgets, and lack of data and understanding around building energy use limit the capacity to complete EE projects.
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¹ The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

² The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

Interventions	<ul style="list-style-type: none"> • Marin Energy Management Team (Marin EMT) staff provide energy use reports and assistance in understanding facility energy use • Marin EMT staff support public agency staff in presenting the case for energy upgrades to governing officials as requested, including presentations and reports.
Outcomes & Impacts	<ul style="list-style-type: none"> • Public facility staff have the information they need to understand energy use in their buildings and the programs available to support improvements • Local agencies have a more efficient public facility stock, saving governments energy and money, and providing additional case studies for other local agencies to complete similar projects.

Empowering HTR Communities

Problem	Understanding energy data and available resources is especially challenging for SMBs in HTR areas that have small staff sizes, speak English as a second language, and/or have limited bandwidth to dedicate to energy upgrades outside of running a business and are often skeptical of sales calls.
Interventions	Direct outreach to qualifying SMBs in HTR areas by MEWP staff will bring trusted information about understanding energy bills, available financing programs, and benefits of energy efficiency.
Outcomes & Impacts	<ul style="list-style-type: none"> • By meeting SMBs where they are, barriers to understanding and acting on available energy efficiency programs are reduced, and business owners have a trusted community contact they can call on with questions. • Businesses save money and set an example of potential savings through energy efficiency savings to other businesses in their community.

3. **Process Flow Chart:**

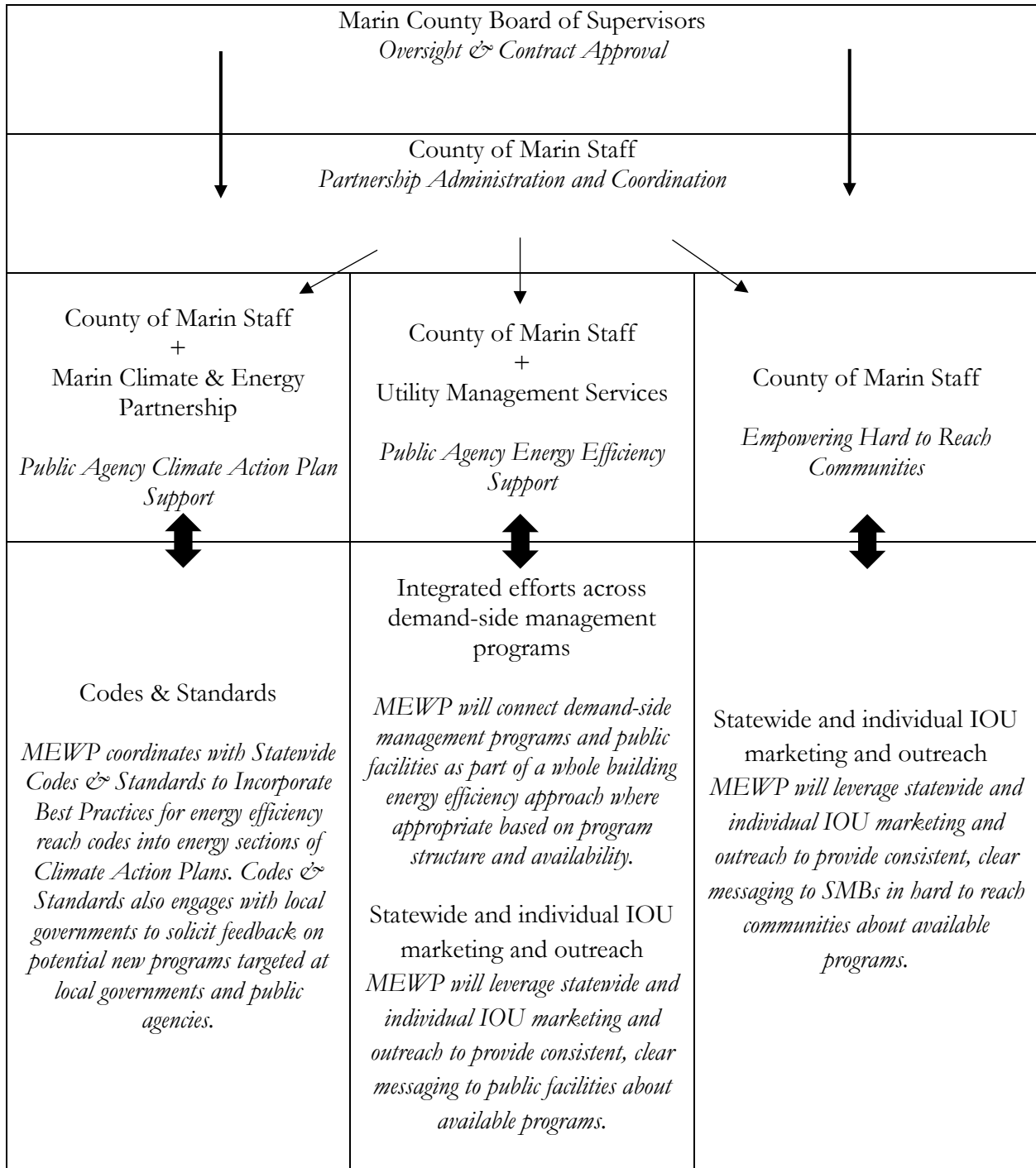
<i>Engagement of Public Agencies</i>		
Direct outreach about energy efficiency project and/or facility energy use	Presentation to a meeting of public agency staff and/or decision makers	Existing relationship with MEWP
<i>Project Exploration & Kickoff</i>		
<p>Initial meeting with MEWP and Public Agency Staff. Meeting serves as an opportunity to:</p> <ul style="list-style-type: none"> • Discuss the agency’s high-level goals around energy efficiency, greenhouse gas reduction, and cost savings. • Identify potential projects based on facility-specific analysis of energy use and planned upgrades 		
<i>Project Determination</i>		
<p>MEWP works with public agency staff and decisions makers to determine and refine their needs such as drafting a bid for a project; better understanding energy use; or energy efficiency integration into an existing plan or project.</p> <p style="text-align: center;">This is then used to set forth a plan for the project.</p>		
<i>Project Development & Implementation</i>		
<p style="text-align: center;">MEWP staff provide tailored project support as necessary throughout the project. This can include:</p>		
<p style="text-align: center;"><i>Administrative Support</i></p> <p>Drafting staff reports; developing energy data reports; making presentations to decision makers (city councils, Boards, etc.)</p>	<p style="text-align: center;"><i>Technical Support</i></p> <p>Reviewing technical specifications; assisting in assessment of bids received; analyzing energy data</p>	<p style="text-align: center;"><i>Financing and Incentive Support</i></p> <p>Connecting project work to available incentives and guiding agency staff through application processes; helping with post-project reporting</p>

4. **Incentive Tables, Workpapers, Software Tools:** Not applicable as MEWP is a non-resource program.

5. **Quantitative Program Targets:**

Quantitative Program Target Description	Program Target
<p>Public Sector and HTR Contacts. MEWP will track the number of contacts by sector (public facility or hard-to-reach (HTR)) and type (active or passive). These contacts will be achieved via outreach efforts including but not limited to community events, digital marketing, networking events and trainings.</p>	<p>20 public sector contacts per year and 12 HTR contacts per year</p>
<p>Lead Generation. MEWP will track the number of public facility and HTR leads referred to resource program implementers (or assessments and leads that convert to projects). While MEWP cannot force public agencies or SMBs to implement projects, staff will work to identify appropriate connections to resource program offerings and serve as a bridge between potential projects and available funding. Achievement of this program target is dependent on the available program offerings.</p>	<p>Complete 3 public facility and 20 HTR SMB business referrals per year</p>
<p>Project Reports. MEWP will track the potential project reports for public agencies. While we do not have the authority to force a public agency work with MEWP on project identification but can adjust our program parameters in order to increase participation.</p>	<p>Complete 3 project reports per year</p>
<p>Climate Action Plan (CAP) Energy Sections. MEWP will complete and track the number of energy sections of Climate Action Plans for Marin’s public agencies. Because not every jurisdiction updates their Climate Action Plan each year, the goal is to complete the energy sections in the plans slated to be updated that year.</p>	<p>Complete 1 EAP/CAP energy section per year</p>
<p>Energy Tracking Reports & Building Benchmarking. MEWP will develop energy usage reports and benchmarking for public facilities in Marin County. This depends on participating public agency to complete the access agreements for data tracking, which has historically been successful. These reports will provide participating public agencies with information about facility energy use and appropriate resource programs.</p>	<p>Complete 12 energy tracking reports and benchmark 3 buildings per year</p>
<p>Climate Action Plan Greenhouse Gas Inventories. MEWP will develop and keep track of all CAP inventory developed reports for public agencies. This work is completed each year for all of the 11 cities and towns in Marin County and the unincorporated County, for a total of 12 annual inventory reports.</p>	<p>Complete 12 Climate Action Plan inventory reports per year</p>

6. Diagram of Program:



7. **Evaluation, Measurement & Verification (EM&V):** Not applicable as MEWP is a non-resource program.
8. **Normalized Metered Energy Consumption (NMEC):** Not applicable as MEWP is a non-resource program.

Attached Program Manuals

Program Management Plan

Policies and Procedures Manual