

## MEETING NOTES

### Energy Council TECHNICAL ADVISORY GROUP (TAG)

Tuesday, May 16, 2017 – 1:00 pm to 3:00 pm

#### Attendance:

City of Alameda: Maria DiMeglio

City of Berkeley: Caytie Campbell-Orrrock

City of Dublin: Rebecca Parnes

City of Emeryville: Nancy Humphrey

City of Fremont: Rachel DiFranco

City of Hayward: Mary Thomas

City of Oakland: Shayna Hirshfield-Gold

City of Piedmont: Emily Alvarez

City of San Leandro: Sally Barros

County of Alameda: Ryan Bell

StopWaste: Heather Larson, Karen Kho, Miya Kitahara, Judi Ettliger

Guests: Chris Sentier, Offset Project; Jeffrey Liang, CSE; Brian Gitt, Utility Score

Civic Spark Fellows: Fanny Yang, Christopher Sturken, Benjamin Davenport, Olivia Ashmoore, Jacob Strauss, Kranti Malik

## Meeting Notes

### Energy Council Board Updates

- EC Staff is taking CEC Local Government Leadership Challenge multifamily grant award for acceptance to enter into \$1,000,000 contract to the Board in May.

### East Bay Clean Energy Coordination

- EBCE Local Business Development Plan summarized by Chris Sentieri, Offset Project, Senior Project Manager for the LBDP project, and stakeholder coordinator. He is contracted to manage the development of a comprehensive plan intended to accelerate deployment of local clean energy, distributed energy resources within Alameda County, and maximize benefit delivered to local community from CCA program.
- Plan must be finished before CCA launches in Spring 2018.
- Emphasis on stakeholder, community engagement: Focus groups, roundtables scheduled for week of June 12, followed by surveys. Week of workshops with committee will occur in August reviewing stakeholder input and how it has been incorporated.
- Tasks currently underway include:

- 1. Grid-side distributed energy resources (DER) (1MW+) technical potential study: including site survey, plus wind, landfill gas, biomass, energy storage, micro grid, demand response
  - 2. Behind-the-meter DER analysis: including energy efficiency, smart appliances/thermostats, fuel switching, etc. based on usage data through PG&E to identify hotspots in the load (e.g. peak load) to inform programs to address peak loads to stabilize operations
  - 3. Recommendations: Feed-in-tariff program, net energy metering, rate design, on bill repayment
- Future tasks include determining labor standards, financing options, funding available to leverage, policy and implementation issues, integrated resource planning, developing the plan, selecting tools that allow scenario comparison and evaluation.
  - EBCE will investigate the potential and provide recommendation on pursuing CPUC Public Goods charge EE funds and seek to find common ground with PG&E and other EE programs.
  - EBEW policy & regulatory subcommittee's white paper seeks to establish common understanding for LBDP team and EBCE board, identifying gaps and opportunity to leverage existing programs and fill gaps.

### **Program Updates**

- Energy Upgrade California rebranded by new marketing consultants, DBB. The logo and brand has been changed. New brand focuses on awareness with a mix of media, working with PA's to co-brand.
- New logo and website has been rolled out. BayREN will update brand once guidelines are issued.
- Some translation is expected.
- Profiling personal stories of people "doing their thing."

### **CAEATFA Residential Energy Efficiency Lending Program**

- Jeffrey Liang with CSE presented on CHEEF REEL program
- The program intent is to provide financing to overcome upfront cost barrier. Successful project financing will be cash flow positive from Day 1. The program components are as follows:
  - State works with certain credit unions which make loans with State Treasurer's office to lower interest rate through credit enhancement, no closing costs or maintenance fees.
  - Loans: \$1,500-50K (up to 30% non-EE costs) for 5-15 year terms (negotiated with the credit union); credit enhancement allows greater eligibility. Interest rates lower than PACE. Loan goes with borrower, no early repayment penalty.
  - Borrower: Property owner or tenant (with PO consent) min credit score of 580, Debt to Income Ratio <55% no home equity requirement

- Property: IOU service (okay to be in CCA), single family (1-4 units allowed by some lenders)
- Project: EE only (no water or renewables), fuel switching is eligible, bill neutrality not required.
- Marketing efforts include GoGreenFinancing, an online tool to help compare product options and terms, IR's, etc. Marketing push with contractors and radio campaign are coming soon.
- Launched a year ago, not much uptake yet (attributed to lack of education) with 115 contractors approved and adding 3-4 per week.
- Feedback to Jeffrey: Direct marketing caution, need license for door-to-door marketing in some communities (San Leandro)

### Utility Score

- Brian Gitt with Utility Score provided overview. Toolkit for contractors to accelerate energy upgrades; personalization of savings estimates and customize offering on an address
- Utility score was developed to capture value during sales transaction, score based on cost and usage. It scores all houses on a 1 (high bills) to 100 (low bills) and shows impact of potential upgrades. Estimates usage and savings potential for various upgrade options.
- It contains profiles of 84M single family homes in the U.S. from tax assessor data, public data, homeowners updating their own home data, contractor submitted data. If home hasn't been claimed and updated, profile is based on public data. Fuel type, major permits pulled.
- Used by contractors to make sale, contractor pays by unit (address) with unit costs lower with higher volume.
- Programs/local governments can use it to screen a mailing, share with contractors
- Developing relationships with the industries (solar, HVAC, windows contractors) to obtain data and to encourage them to use the data to generate leads
- Local contractor lead generation: word-of-mouth over 50%, even large companies (SunRun = 30% word-of-mouth) and cheapest way to acquire customers. How can we accelerate word-of-mouth referrals?
- Contractor – gives Utility Score all of their past projects, analyze variables and tease out conversion rates to inform the characteristics and utility bill range to target for leads.
- Privacy issues: All data is public data, all home facts from Zillow, just aggregated in a visible format.
- Realestate.com utility estimate coming from Utility Score
- Solar boosts the score more than any other upgrade (common score of 25 on solar sites is because they have pools)
- Home facts feature: update based on improvements that have been done. Could add EVSE or electrification. Homeowner, real estate, contractor can claim the record (attest with process similar to Zillow) to update. In the future, could add a third-party verified feature. Open to tying into existing verification programs like Home Energy Score.

- San Leandro used Utility Score for homeowner workshop direct mail to pick 5,000 top energy users in each zip code. Got the highest attendance, with 3-4x usual workshops, also more of a diverse group compared to usual public workshops.
- Boosted SunRun click rate by 240%. SunRun website redesigned to generate Utility Score report.

### **Bay Area SunShares 2017 Coordination**

- Debriefed with SunShares – cities had lower participation this year than last year; one of the issues was related to one of the solar contractor’s performance, but there were additional reasons. Cities that had higher EV option had better uptake on solar. EV offering may have helped, but could have been improved (limited dealership locations – San Jose for Leaf and SF for Mirai). City of Oakland negotiated a \$10,000 discount for Nissan Leaf for City employees through their relationship with the City fleet. SunShare asked to negotiate with OEM to ensure wider geographic spread of dealerships.
- Electrification: Need to develop cohesive marketing around electrification, cities advocated for electrification to be included in the SunShares aggregation (HPWH and HP heating and upgrading electrical panel to facilitate electrification). Adding more products complicates the program and messaging. Panel upgrade makes sense because it’s being addressed during a solar installation.
- Reach code opportunity: NC 150 amps, existing is 60 amps. City could state higher minimums. NC 200 amps, existing if upgrading electrical panel, need to install 200 amps (or max allowable capacity by PG&E). To accommodate EV + HP. Alice LaPierre added up all potential appliances and EV plus code required extra capacity = 310. Requirements are in electric code, not energy code. Needs further study.
- Agencies and SW staff to coordinate on outreach/messaging and look into incorporating fuel switching down the line. Ideally, panel upgrades & key appliances that can be electrified would be included in SunShares or other single family program offerings. If it cannot be included in aggregation purchasing rfp, at least include education.

### **Single Family Outreach**

- Judi Ettlinger presented single family outreach update, including deliverables for the year: Homeowner, realtor, and contractor workshops.
- Homeowner workshops:
  - Dublin (42 attendees; didn’t use Utility Score but did screen for characteristics of homes that have done energy upgrades) and San Leandro in May; Fremont and Berkeley/Albany in fall.
  - Direct mail was expensive but effective, about \$3,500 for 5,000 addresses.
  - Request to share the schedule of upcoming homeowner workshops across the County so other (smaller) cities without workshops planned can send their homeowners.
  - Observation from the group that the Caliber of contractors and the information they provide at the workshops to homeowners is much higher than 5 years ago.
- HES campaign: online digital campaign, surveying assessors on increase of leads

## **Member Comments & Discussion**

- Need to have a more cohesive messaging campaign across single family program offerings
- 2018 BayREN scope should have a greater effort to layer content from other programs into BayREN outreach deliverables. SunShares commented that most effective workshops were those that layered multiple program opportunities. City staff needs to be informed of all programs so they know how to layer.
- Hayward hosting a property-oriented (rather than program-oriented) workshop for multifamily property owners.

**NEXT TAG MEETING:** June 20, 2017 1-3pm