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1. Company Overview

MCE is a local community choice agency that provides customers with the ability to decide how their electricity is sourced. MCE offers consumers a range of renewable energy options such as Light Green Service at 60% renewable energy, Deep Green Service at 100% renewable energy and Local Sol, a 100% renewable energy option consisting of only energy generated from local solar projects.

MCE provides an alternative to PG&E as an electricity supplier; MCE customers use PG&E for electricity delivery, line maintenance, and bill delivery.

How MCE works with PG&E

New MCE customers are automatically enrolled into the standard Light Green option which provides at least 60% renewable energy service, but customers can also upgrade to the Deep Green 100% renewable energy option or the Local Sol 100% locally-produced solar energy option. Customers may also choose to opt out of MCE’s energy solutions altogether and instead continue to use PG&E’s standard power.

MCE’s mission is to address climate change by reducing energy related greenhouse gas emissions through renewable energy supply and energy efficiency at stable and competitive rates for customers while providing local economic and workforce benefits.

2. Program Overview

MCE’s Multifamily Energy Savings (MFES) Program provides cost-effective energy efficiency improvements to occupants and owners of low-income and market rate multifamily buildings in the MCE service area. This program is implemented in partnership with the Association for Energy Affordability (AEA) and Franklin Energy
(Franklin). The MFES Program focuses on attentive customer service to ensure quick turnarounds on projects.

The MFES Program offers no-cost energy assessments, technical assistance to solicit contractor bids and develop a comprehensive scope of work. Each multifamily assessment report displays a summary of measure opportunities, recommendations for upgrades, and available rebates.

The MFES program then provides rebates for energy- and water-saving measures for tenant units. Rebates are fixed based on the measure installed.

The MFES program is structured so that it can easily be co-leveraged with other programs, such as BayREN’s Bay Area Multifamily Building Enhancements Program (BAMBE) and PG&E’s Multifamily Upgrade Program (MUP). MCE’s offering promotes deeper retrofits and provides rebates for properties that may not otherwise had access to energy efficiency funding. MCE coordinates closely with partner programs to ensure that there is no double dipping of savings for customers or program administrators, and to share best practices.

2a) Eligibility

MCE’s MFES Program offers free energy assessments, technical assistance, and financial rebates for efficiency measures to customers who:

- Live in a multifamily property of 4 or more units with shared walls.
- Are multifamily property owners or managers of multifamily residences in Marin and Napa Counties, unincorporated Contra Costa County, unincorporated Solano County, and the Cities and Towns of Benicia, Concord, Danville, El Cerrito, Lafayette, Martinez, Moraga, Oakley, Pinole, Pittsburg, Richmond, San Pablo, San Ramon, and Walnut Creek.

Rebates are available to customers for the purchase and installation of energy efficiency measures at the location where the qualifying project is to be installed. MCE will not offer rebates to those customers who have received rebates for the same eligible measure from PG&E, BayREN, or any other ratepayer funded energy efficiency program.

2b) Funding

MCE’s energy efficiency programs are funded by a small surcharge on all Californians’ electricity and/or natural gas bills. The California Public Utilities Commission (CPUC) allows MCE to access a portion of these funds for energy efficiency programs. Current budgets have been approved by the CPUC. All
funding must be used within the year it was provided, or the budget for the following year will be reduced accordingly. MCE can request additional funding with a Petition for Modification to the CPUC.

As part of receiving these funds, MCE energy efficiency programs must accurately track and report all budget expenditures. Energy efficiency measures include both gas and electric components and therefore gas and electricity savings will be reported to the CPUC in monthly, quarterly, and annual reports.

<table>
<thead>
<tr>
<th>Allocation</th>
<th>2020 Budget</th>
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<tbody>
<tr>
<td>Administration</td>
<td>$106,983</td>
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<tr>
<td>Direct Implementation Non-Incentives</td>
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<tr>
<td>Incentives</td>
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<td>Marketing &amp; Outreach</td>
<td>$6,500</td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td><strong>$412,358</strong></td>
</tr>
</tbody>
</table>

2c) Program Implementation Parties

The Program is administered and implemented by MCE and their partners, and reports to the CPUC. The roles of each party are defined below.

**MCE** is a public agency and not-for-profit electricity provider formed in 2008. MCE designs and administers energy efficiency programs using ratepayer funding and is California’s first Community Choice Aggregation program. MCE administers the MFES.

**Marin Municipal Water District (MMWD)** is a public government agency that provides drinking water to southern and central Marin County.

*Role*: Water efficiency expert
- Provides showerheads and aerators for MCE’s Direct Install service
- Offers additional rebate programs
- Refers properties to MCE’s MFES Program and accepts referrals from it

**North Marin Water District (NMWD)** is a public government agency that provides safe and reliable drinking water and delivers sewer service to the population in and about the city of Novato.

*Role*: Water efficiency partner
- Offers additional rebate programs
Association for Energy Affordability (AEA) is a nonprofit organization dedicated to achieving energy efficiency in new and existing buildings, offering engineering, auditing, and training solutions. AEA is MCE’s technical implementer and provides technical assistance, project management and quality control (QC) services.

**Role:** Technical implementer  
- Delivers program technical assistance and QC  
- Collects and manages project data  
- Provides program reporting support  
- Conducts training for the Direct Install team  
- Educates property staff on new technologies and equipment maintenance

Franklin Energy delivers flexible energy efficiency and grid optimization programs that enable utilities to achieve their highest-priority goals. The company’s integrated in-house services and proven software provide deeper personalization and insights, acting as a true partner to utilities.

**Role:** Direct install partner  
- Manages and provides Direct Install services

California Public Utilities Commission (CPUC) and its Energy Division (ED) directly approve and oversee the MCE Programs.
3. Program Process

3a) Participant Enrollment Process

Multifamily Program Process

1. **Complete an online interest form**, which will be reviewed for eligibility by AEA. After AEA determines eligibility, they will contact the property owner/manager to discuss the needs of the property and their desired measures.

   The online interest form asks prospective customers for the following:
   - Name of property and address
   - Number of buildings and units
   - Year the building was built
   - Building features
   - Customer contact information
   - Primary language(s) spoken by tenants
   - PG&E account number
   - Programs participated in the past ten years

2. **Submit Intent to Proceed form**. Once a property is ready to move forward, AEA will send the Intent to Proceed form to the property contact. Once it is signed and returned, AEA will reach out to schedule the site visit.
3. **Schedule a no-cost, building energy assessment with a team of technical experts.** The site assessments generally take between two and four hours and must be scheduled when a property manager or other staff member is available to provide access to the property. Based on the assessment, AEA will create a report showing the opportunities available at the property, the estimated savings associated with each measure and the total rebate amount for each.

4. **Choose and implement property upgrades.** AEA will provide support in developing the **scope of work** and prioritizing the most cost-effective measures to upgrade in order to achieve the property’s goals. AEA can assist the property in identifying contractors and developing bid packets if the property does not have a preferred contractor.

5. **Receive no-cost in-unit tenant upgrades.** MCE’s Direct Install service is available to properties that complete owner-paid upgrade projects. Tenants will receive free LED lightbulbs, low-flow showerheads and aerators, and smart thermostats. The team will also conduct outreach to inform tenants of additional ways to save energy.

6. **Get a post-project inspection,** which AEA will conduct to ensure the equipment and measures were installed according to the technical specifications and program standards. AEA will also ensure that operations and maintenance staff are trained on the equipment and are able to troubleshoot any issues that may arise. If the project meets the minimum requirements, it will receive a verification sign off. Additionally, the owner will be required to submit a signed **Statement of Completion form**, which includes rebate check disbursement details, and contractor paperwork such as invoices, permit details, and confirmation of one-year contractor warranty.

7. **Receive Rebates from MCE within four to six weeks of project sign off.**

3b) **Eligibility Determination**

After receiving an interest form, AEA determines if a property is eligible to participate in the program. Generally, verification that the property contains 4 or more units and is located within MCE’s service territory is sufficient to ensure eligibility. Further determination of participation will be completed after the initial conversation with a property.

*If the participant is eligible,* AEA will conduct an initial intake call and begin the enrollment process detailed above.
If the participant is ineligible, AEA will notify the property that they are not eligible for the MCE Multifamily Energy Efficiency Program and will be referred to an appropriate program as available.

3c) Terms and Conditions

Program participants are responsible for reading and acknowledging the general terms and conditions herein as well as the terms and conditions in the Participant Forms. Where discrepancies exist, the form with most recent date should be referenced.

3d) Participant Forms

The program utilizes standardized forms and customizable templates to streamline and track its process. The following forms are used at various stages of the program participation:

Participant Forms

- Online Interest Form
- Intent to Proceed Form
- Rebate Reservation Form
- Statement of Completion Form

Technical Assistance Forms

- Energy Savings Report
- Measure Minimum Requirements

Quality Control Forms

- Rebate Approval Memo

3e) Participant Responsibilities

The participant is responsible for reading and understanding program policies and procedures as well as following the Program Participation Process described above. Participant’s responsibilities within the Program Participation Process include, but are not limited to:

- Submitting an Interest Form
- Providing the information necessary to determine program eligibility
• Submitting an Intent to Proceed form, Rebate Reservation form and signed Terms & Conditions
• Hiring a qualified contractor(s) and overseeing their work to ensure compliant and quality installation within the Rebate Reservation period
• Ensuring compliance with all legal requirements including obtaining necessary building permits and fulfilling tax liabilities
• Submitting a Statement of Completion Form, project invoices and receipts
• Allowing QC site visits by program parties during pre-installation and post-installation verification phases

4. Technical Assistance

4a) Initial Consultation

If a property is determined to be eligible, AEA will schedule an initial phone call with the property. During this call, AEA will discuss the potential scope and project timeline. If the property is a good fit for the program, the project will progress with a site visit. During the initial in-person consultation, AEA and MCE will discuss the following with the participant:

• Program process
• Potential to co-leverage partner programs (if applicable)
• Basic information about the property’s buildings including some information that may be gathered during a site assessment
• Project scope
• Timeline for completing the work
• Capital availability to help pay for the work
• Interest and need for additional financing

4b) Program Referral

AEA serves as the technical implementer for both MFES and BAMBE programs and will be a single point of contact for the owner. AEA’s coordinated approach to program activities will simplify the process for the owner and reduce administrative burden for both programs.

MCE and AEA evaluate the property to determine if they are a good fit for the program based on the information that was discussed during the initial consultation. If it is determined that the property is a better fit for partner programs, such as
BAMBE or MUP, AEA will help properties connect with these services and/or programs. Vice versa, BAMBE and MUP will also be making referrals to MFES.

In the case where multiple programs are co-leveraged with MFES, AEA will ensure that no single measure is being incentivized by two programs of the same funding source. The measures that are being attributed to different programs will be documented so full property participation and benefit is captured, while also ensuring that no double dipping is taking place.

When additional information is needed to make an eligibility determination, AEA may continue with technical assistance through a Site Assessment before the property is provided with a referral. When referring a property to another program, MCE or AEA will send the customer information about the program including:

- Name and description of program(s)
- Explanation of what makes their project a good fit for each program or combination of programs
- Measures suitable for each program
- Next steps for participating in each program, including contact information and application process and requirements

4c) Data Collection

The following information will be collected from program participants for reporting and property tracking purposes.

- Number of units and buildings
- Heating Type: (central, in unit, gas or electric)
- Cooling type
- Domestic hot water type (central, in unit, gas or electric)
- Year built or last renovated
- Pool systems
- Building envelope details (roof/wall/below grade systems, window type, insulations levels)
- Master metered or unit metered

4d) Energy Savings Report

AEA will develop an Energy Savings Report for the participant detailing recommended upgrades that meet the needs and goals of the property. The report notes existing conditions using site specific pictures, the recommended upgrade measures, and the estimated rebate amount. The structure of the Energy Savings Report is as follows:
Table of Contents including project summary, how to use the report and next steps, and contact information for property, MCE, and AEA

Incentive summary detailing measure opportunities, rebate per measure, and potential co-leveraging opportunities.

Measure Descriptions – for each recommended measure, existing conditions and recommended improvements, with photographs as appropriate; may include additional recommended measures without calculated savings

AEA will schedule a follow up call to review the report with and answer any questions the property contact may have.

4e) Financial Analysis

Upon request, AEA may provide assistance with the financial analysis of specific measures. Financial analysis will provide the participant with insights regarding payback, return on investment, and other financial information to help make informed investment decisions. This analysis may be based on cost figures supplied by the participant, contractor bids and utility bill information, or estimates created by AEA. Any estimates provided by AEA are for informational purposes and are not representative of actual cost figures. Participants are encouraged to find precise cost data before making a decision to install measures. The program is not liable for decisions based on estimations generated by AEA.

4f) Partner Resource Conservation Programs

MCE’s MFES Program works closely with MMWD, NMWD, and GRID Alternatives to provide program participants with access to technical assistance and rebates for Solar PV and water conservation measures.

GRID Alternatives (GRID): GRID provides technical assistance to policymakers, affordable housing providers, city and county government agencies, and Native American tribes across the country. At no cost, they provide:

Technical assistance:

- Complete portfolio assessment for multifamily housing owners.
- Identification of options for funding and installing solar on existing or new construction/rehab buildings.
- Turnkey installation services using our unique volunteer and workforce development model. GRID Alternatives is a c-10/c-46 contractor.
- Owner representation, bid analysis and other services to support the implementation of solar for building owners.
Community engagement:

- Workforce development opportunities: Hands-on installation experience for residents through our volunteer model, and opportunities for residents to connect to our national network of nearly 100 solar industry and workforce development partners to access jobs in the growing solar industry.
- Energy efficiency education to help residents reduce their energy use.

5. Rebates and Incentives

5a) Rebate Structure

The following tables show the most common measures for energy savings at a multifamily property. Measures are assigned a rebate based on the deemed\(^1\) costs of the measure. The property can choose to install all or just one of these measures. The total rebate amount will be based on the total number of tenant units and the measures they choose to install. The property can choose whichever measures they feel are the most effective in meeting their goals and budget.

Rebates are determined by AEA based on the upgrades that the property agrees to complete. The installed measures quantity verified with a sampling of units during the post-install site visit, as well as invoices to confirm the total count.

For measures and/or work scopes that are outside of a typical upgrade package, AEA will custom calculate the rebate and point equivalent of the measures. This is typically based on a custom rebate structure of $0.2/kWh and $1.00/therm.

Rebates are subject to change based on workpaper updates.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Rebate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showerhead*</td>
<td>$15 or Direct Install</td>
</tr>
<tr>
<td>Aerator*</td>
<td>$3 or Direct Install</td>
</tr>
<tr>
<td>Demand Recirculation Control*</td>
<td>$40/unit served</td>
</tr>
</tbody>
</table>

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\(^1\) Prescriptive energy efficiency measure with predefined savings calculations, cost, eligibility, and other measure attributes.
<table>
<thead>
<tr>
<th>Measure</th>
<th>Rebate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart thermostat*</td>
<td>$75 or Direct Install</td>
</tr>
<tr>
<td>Tankless Water Heater</td>
<td>$325</td>
</tr>
<tr>
<td>Energy Star Tank Water Heater</td>
<td>$100</td>
</tr>
<tr>
<td>Condensing Central Water Heater</td>
<td>$125/apartment served</td>
</tr>
<tr>
<td>Attic/Wall Insulation (from R-0)</td>
<td>$1.25/sq. ft</td>
</tr>
<tr>
<td>Pool Pump</td>
<td>$275</td>
</tr>
<tr>
<td>Energy Star Refrigerators</td>
<td>$20</td>
</tr>
<tr>
<td>Common area lighting (&gt; 50W fixtures/bulbs)</td>
<td>$0.20/kWh saved</td>
</tr>
<tr>
<td>Apartment LED Bulbs (non-A19)</td>
<td>Direct Install</td>
</tr>
</tbody>
</table>

*Table 1: List of Possible Measures and Associated Rebates*

**5b) First-Come First-Serve Basis**

Rebates for property upgrades will be available on a first-come first-serve basis. The MFES Program Manager will monitor the reservation of rebates with the goal of ensuring that properties who continue to make progress towards completing their energy efficiency projects will have access to all eligible rebate monies. Once all available rebate funding has been reserved and/or disbursed, properties will be added to a waitlist until such time that additional funding becomes available.

**5c) Waitlist**

Rebate reservations that are submitted after all rebate funds have been reserved will receive technical assistance to assess the property and complete a scope of work. However, these projects will be placed on the waitlist for rebate reservations and will be able to proceed with their project with expectation of receiving rebates only when more rebate funds have become available either via another project dropping out of the program or acquisition of increased funding from the CPUC. There is no guarantee that projects on the waitlist will receive the rebate requested.
5d) Rebate Expiration

Rebates are typically reserved for 90 days. This timeframe may vary based on the project timeline and scope. Rebate reservations can also be extended upon determination that significant progress toward project completion has been demonstrated. AEA and MCE will determine the measure of “significant progress” based on the individual project. If a project does not illustrate significant progress, the rebate reservation may be canceled, and the funding will be re-entered into the program for use on other projects.

If a property owner does not contact MCE for 60 days, the rebate reservation will be canceled and the monies reallocated to other projects.

5e) Rebate Qualifications Requirements

Program participants must have received Technical Assistance from AEA in the form of a Site Assessment and Site Verification in order to qualify to receive rebates.

In situations where the owner is working with a third party for project management services, the owner must participate in the initial phone call to learn about the MFES offering as well as the scope development call to go over the energy survey report.

Rebates will not be disbursed until it is determined that a participant has successfully completed the agreed upon project scope to the program’s minimum requirements standard. This is determined by AEA’s verification of a post-installation site visit and a signed Statement of Completion Form.

6. Quality Control

An AEA energy analyst will provide on-site QC at a minimum of two stages of the project: pre-installation and post-installation of the approved scope for verification.

6a) Site Assessment

AEA will conduct a site assessment to verify the existing building conditions, identify opportunities for rebates, and complete combustion appliance safety testing on a sampling basis per the MFES Program Home Energy Retrofit Coordinating Committee (HERCC) protocols. The site assessment is not a health and safety assessment, and the program assumes no liability for any building health and safety related issues. The pre-Installation site visit may include:
• Meeting with property staff to discuss priorities and concerns
• Assessment of the common areas, mechanical systems, and supplies
• Assessment of a sample group of tenant units
• Combustion safety testing of any gas appliances in the building

AEA will summarize the findings and measure opportunities in an Energy Savings Report following the site assessment. The report will be sent to the property contact and a follow up call will be scheduled to review it. After the call, AEA will work with the property to develop a scope of work and complete the Rebate Reservation form. AEA can also prepare bid documents if the property needs support in securing a contractor to complete the work.

If the property has a scope of work already in development, AEA can support the process by providing the contractor with equipment and materials specifications to ensure the upgrades meet the minimum criteria to receive rebates. It is ultimately the responsibility of the participant to ensure that installed work is consistent with the program requirements to avoid forfeiting the rebate.

During the site visit, property staff will need to provide access to the following:
  • Site exteriors, including rooftops and parking structures
  • Common areas
  • Central system maintenance rooms (e.g. boiler room)
  • Sample of residential units

6b) Post-Installation Site Visit

Once the scope of work is complete, AEA will review the materials for completeness and consistency against the Rebate Reservation Form and the minimum performance requirements. A post-installation site visit is scheduled, which may include:
  • Inspection of common areas
  • Inspection of a representative sample of apartments
  • Verification that all equipment was installed
  • Combustion safety testing of any gas appliances that may have been affected by the work scope or failed the initial testing

If AEA verifies the installation and finds all conditions acceptable, they will complete a post-installation verification memo and submit all applicable program documents to MCE. The program staff will then review the materials for consistency with Rebate Reservation Form and minimum performance requirements. They will also verify that the project has not previously received ratepayer funding for the same measures. If approved, MCE will process the claim and issue a check to the participant.
6c) Installation Requirements and Documentation

MCE’s MFES Program contains a set of minimum performance requirements for standard measures and will determine requirements for more complex or custom measures when necessary. This may include assistance with the following tasks which are the responsibility of the participant.

- Initial specification requirements for common measures
- Changes to initial specification requirements during the construction process
- Development of building or measure specific requirements when necessary
- Assistance facilitating the bid process and selection of appropriate contractors
- Pre-bid walkthroughs with contractors, property managers, and building maintenance supervisors to review the specifications and the scope of work
- Review and final signoff of contractor submittals to ensure that the equipment being installed matches the intent of the measure recommendations including verification of system sizing calculations

Installed measures must match the Rebate Reservation and minimum performance requirements documents signed at the beginning of a project. The post-installation site visit verifies program minimum requirements have been met to allow rebate approval.

Upon project completion participants are required to submit the following to MCE and AEA. MCE retains all documents in the project file:

- Project invoices and receipts
- Copies of all permits pulled as part of completing the rebated scope
- For space heating, cooling, and ventilation measures, contractor certification stating that all applicable work permits have been obtained with applicable permit number(s) and contractor signature
- Confirmation of contractor minimum 1-year warranty

6d) Product Endorsement and Warranties

The MFES Program endorses and guarantees a one-year minimum contractor warranty to customers. Additional manufacturer warranties are also guaranteed.

7. Safety Assurance

7a) Health and Safety/Combustion Testing
The participant and their hired contractor(s) are responsible for ensuring the safety of residents and workers at the property.

During the initial site assessment AEA is focused on collecting information on existing site conditions in order to make recommendations for energy and water savings upgrades. The site assessment is not a health and safety assessment, and the program assumes no liability for any building health and safety related issues. If AEA identifies any immediate health and safety concerns, including signs of moisture issues, pests, lead, asbestos, electrical hazards, or other general health and safety concerns, they will notify the property representative immediately. It is the owner’s responsibility to ensure that those health and safety concerns are addressed.

Combustion safety testing is performed where required at the site assessment and site verification. AEA will conduct combustion safety testing on combustion appliances in a sampling of apartments. All critical issues must be addressed prior to the start of work.

8. Payments and Reservations

8a) Intent to Proceed

MCE requires an Intent to Proceed form for all properties that participate in the MFES Program before moving forward with free technical assistance.

8b) Rebate Reservation

Once the scope of work has been developed, AEA will complete the Rebate Reservation Form. The property owner will select the measures which they commit to installing and sign the form. The Rebate Reservation Form summarizes the approved scope and the participant’s agreement that they intend to install the approved scope and wish to reserve the specified rebate dollars. Upon receipt of the Rebate Reservation form MCE will earmark the rebates for the property.

8c) Rebate Claim

Upon completion of measure installation, the participant submits a Statement of Completion Form. The Statement of Completion Form collects the following information.

- Approved or revised and verified scope, supplied by AEA
- Contractor receipts, invoices, and/or statements of completion
- Confirmation of contractor 1-year warranty
• Rebate check disbursement details

8d) Rebate Payments

Rebate payment is made in the form of a check payable to the property owner, unless otherwise indicated on the Statement of Completion Form (MCE can make checks payable to the contractor of record if so directed).

If upgrades will be completed over a longer period of time, MCE will support project phasing; however, MCE will require monthly progress updates in order to continue to reserve rebates for a project with an extended completion schedule.

Rebate payment is sent to the participant between 4-6 weeks of receipt of the Rebate Memo from AEA.
Appendix A: Glossary of Terms and Acronyms

PG&E — Pacific Gas and Electric Company
BayREN — Bay Area Regional Energy Network
AEA — Association for Energy Affordability
MCCDC — Marin City Community Development Corporation
CPUC — California Public Utilities Commission
MMWD — Marin Municipal Water District
Program — Offering of technical assistance and rebates, their implementation, and administration
Participant — Property owner or authorized third party (i.e., property manager) enrolled in the program who has decision-making authority
Project — Building(s) under the ownership of one entity or subsidiaries of one entity that are receiving technical assistance and/or on which rebated work is completed
Approved Scope — Measures that have been agreed upon to be completed in the current project
Residential Spaces — Units and areas used to access these units. This includes hallways, stairwells, laundry rooms, but not rooms for uses that aren’t necessary to the maintenance of a household (i.e., computer/community rooms)
Nonresidential Spaces — Retail spaces, offices, commercial laundry facilities for the public (as opposed to laundry accessible to only home tenants), computer and community rooms
Rebate — Partial refund
Double-dipping — Overlap of energy efficiency projects resulting in possible double payment of a measure
SPOC — Single point of contact
Rebate — Payment to property for completing approved scope, can be used to supplement the cost of a project
HOA — Home Owners Associations
DEER — Database for Energy Efficient Resources
HERCC — Home Energy Retrofit Coordinating Committee that sets recommended program requirements through the CPUC
EM&V — Evaluation, Measurement and Verification
Intent to Proceed Form — Includes customer and contact information. This form, once signed, is a customer’s agreement to participation and installation of energy efficiency measures in MCE’s multifamily program
Rebate Reservation Form — Owner’s agreement to implement the building scope of work and to proceed with each indicated measure
Statement of Completion Form — Includes customer/owner information and rebate disbursement. This form, once signed, certifies that that all the work in the final proposal have been completed to program standards and is covered by a one-year
warranty on all parts. It is also an agreement as to who the final rebate payment should be sent to.

**Recommended Upgrade Scoping Report** — This report contains the results of the initial energy survey of a location. It presents specific recommendations for the reduction of energy use as well as improvements to the health, safety, comfort, and security of the buildings’ residents and staff.

**Post-Installation Rebate Approval Memo** — Owner and Energy Analyst’s agreement to the total rebates for the listed package of measures. This form lists the total check amount that will be made payable to the Owner.
Appendix B: Contact Sources

- MCE Residential Programs Manager – Grace Peralta
  o Telephone: 415-464-6026
  o Email: gperalta@mcecleanenergy.org
- AEA Technical Assistance Provider – Nick Dirr
  o Telephone: 510-431-1792
  o Email: ndirr@aea.us.org
- AEA Technical Assistance Provider – Megan Ching
  o Telephone: 510-270-4365
  o Email: mching@aea.us.org