

Metrics Initiative Statement

11/12/20

Within this document, we describe the background that is foundational to this metrics initiative, indicate the metric initiative goals, provide the metrics that are included in this initiative, and give a tentative schedule for completion of the initiative.

Background

The purpose of the East Bay Community Energy Authority ("EBCE") Community Advisory Committee ("CAC") is to advise the EBCE Board of Directors ("Board") on all subjects related to the operation of the Community Choice Aggregation program pursuant to California Public Utilities Code Section 366.2 ("CCA Program") as provided in Section 4.9 of the EBCE Joint Powers Agreement and set forth in a work plan adopted by the Board of Directors from time to time. Further, in the CAC Workplan, the CAC specified three broad areas of focus for CAC actions: 1) Beneficial Pillars: Social, Economic, and Environmental, 2) Local Opportunities, and 3) Legislation and Public Policy.¹

The Local Development Business Plan (LDBP) is currently in Stage 1 of implementation. Within Stage 1, there are 7 identified LDBP Performance Metrics to track progress and evaluate the performance of the LDBP. While these metrics are quantitative, the methodology for measuring the specific qualitative units is not defined. As such, there has not yet been reporting against the 7 metrics.² The goal of the CAC Metrics Initiative is to 1) understand and comment on the measurement and reporting methodologies proposed; and 2) understand the current status of and timeline for reporting out Stage 1 metrics.

Metrics Initiative

The CAC's 2020/2021 chair and vice-chair have chosen to work on a *metrics initiative* between now and June 30, 2021 (which is the end of their term). During this period, they will work directly with relevant staff and bring all information back to the CAC for discussion.³

The metrics initiative focuses on the first of the three broad area (beneficial pillars) and draws on the stages and metrics laid out in the LDBP. The LDBP has three stages that roughly align to fiscal years and cover the first five years of EBCE operations. (EBCE is finishing up Stage 1 in 2020/2021.) The LDBP went through an extensive public process. Therefore, this initiative does not revisit the established metrics, but instead has three goals:⁴

- **Document** where EBCE stands in terms stage 1 efforts. This is expected to be a "qualitative" documentation (meaning staff will provide a high level, subjective, description of the status of the multiple efforts).
- **Document and track** the values ascribed to the LDBP metrics
- **Describe** how the beneficial pillar principles of social equity and just transition are being addressed through the activities, LDBP or other, of EBCE.

The metrics initiative covers the LDBP metrics, as described next.

LDBP Metrics

The LDBP includes seven (7) performance metrics to estimate and track the performance of LDBP actions in each stage. Table 1 includes the metrics in the plan that are part of Stage 1 and Stage 2 efforts. The plan shows these metrics being expanded and refined in Stage 3 (around 2022-2023).

¹ The CAC workplan was approved by the Board on 10/17/18.

² Additionally, the LDBP efforts were designed within Stage 1 and have been ramping up, so there has been little to track until recently.

³ Because all CAC meetings are public, the metrics initiative is, therefore, also a public process.

⁴ In all cases, we will work with relevant EBCE staff to accomplish these goals.

Table 1. LDBP Performance Metrics

Category	Performance Metric (Units)
Direct Annual Jobs	Created Full-time Equivalents (FTE's)
Labor Wage Impacts	Direct Job Wages (\$'s/hour)
Fiscal Impacts	Costs (\$'s spent), Cost Savings (\$'s saved), Surplus Revenue (\$'s/year)
Customer Cost Savings	\$'s saved (Total and by Customer Class)
Local Energy Generation	GWh's Generated per Year
GHG Emission Reductions	Metric Tons of CO ₂ e (MTCO ₂ e) reduced, GHG Intensity (MTCO ₂ e/MWh)
Criteria Air Pollution Reductions	Metric Tons (MT) of Criteria Pollutants reduced

Tentative Schedule of Activities

We hope to complete this initiative within the next seven months, but recognize that it may take more than seven CAC meetings to enable full feedback. We may hold a special metrics workshop in the spring if the CAC is interested and we expect to need more time than our regular CAC meetings.

Table 2. Metrics Initiative Tentative Schedule

Month	Metrics Initiative CAC Discussion
November 2020	Introduce Metrics Initiative (Mary) Describe EBCE data sources for metrics (JP)
December 2020	Describe specifics on what EBCE will be able to track via the CRM
January 2021	Describe the IMPLAN results and perhaps Stage 1 efforts information
February 2021	No metrics discussion
March 2021	No metrics discussion
April 2021	Describe the results deriving from the CRM data
May 2021	No metrics discussion
June 2021	TBD



Metrics Initiative

PRESENTATION TO CAC

11/16/20

A Little Background

(on Metrics and the Local Development Business Plan, LDBP)

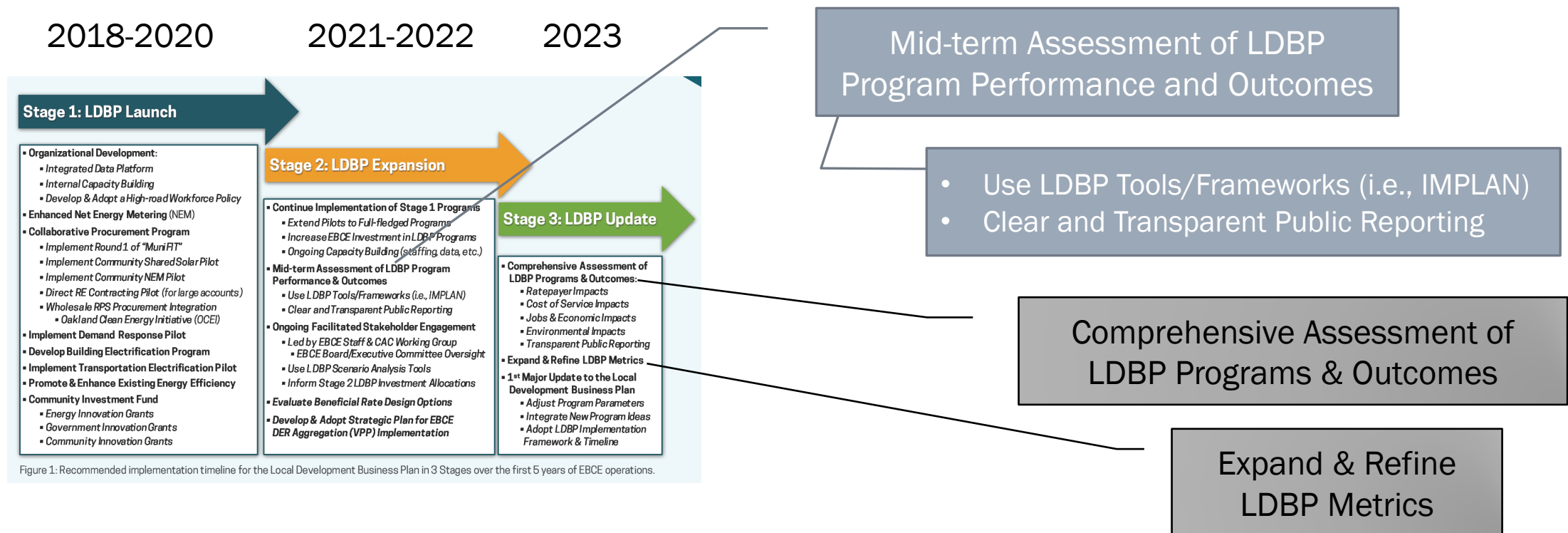


Figure 1: Recommended implementation timeline for the Local Development Business Plan in 3 Stages over the first 5 years of EBCE operations.

A Little More Background

7 LDBP Performance Metrics

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Metrics Initiative

WHO: CAC CHAIR AND VICE-CHAIR; EBCE STAFF; FULL CAC; PUBLIC

WHEN: NOW TO JUNE 30,2021

WHY: SYSTEMATICALLY INCLUDE THE CAC AND PUBLIC IN LDBP METRIC DISCUSSIONS

What the Initiative Seeks to Accomplish



Document

...where EBCE stands in terms Stage 1 efforts

This is expected to be a “qualitative” documentation

(meaning staff will provide a high level, subjective, description of the status of the multiple efforts)



Document & Track

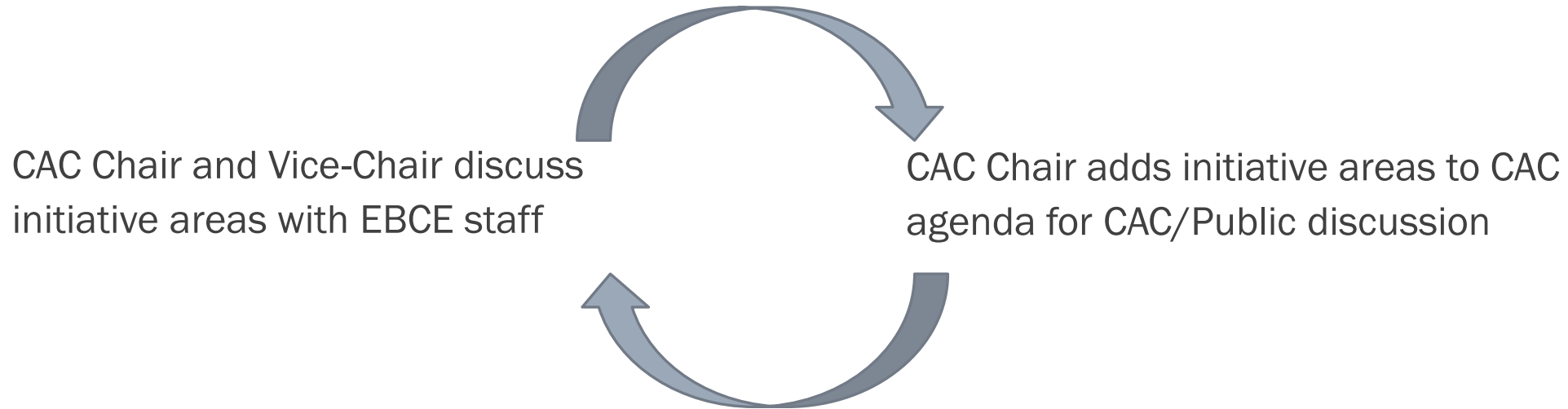
...the values ascribed to the LDBP metrics



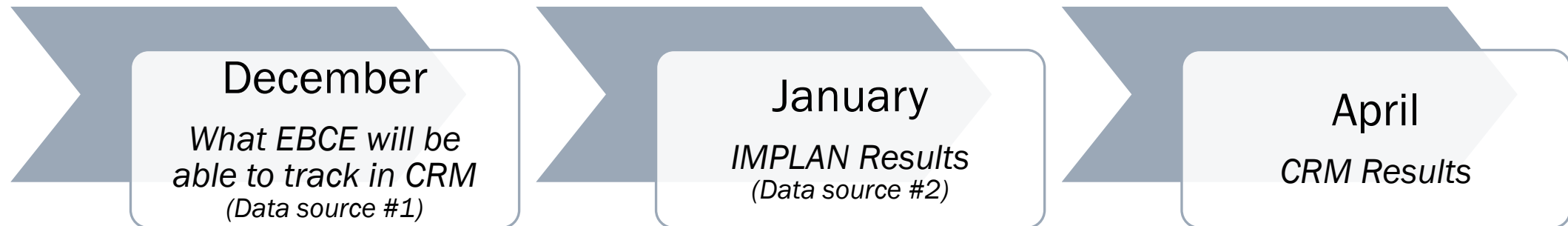
Describe

...how the beneficial pillar principles of social equity and just transition are being addressed through the EBCE activities (LDBP or other efforts)

How we will implement the Initiative



Tentative Timeline of Information to the CAC/Public



Not everything that counts can be counted. Not everything that can be counted, counts.

- ALBERT EINSTEIN OR WILLIAM BRUCE CAMERON



LOCAL DEVELOPMENT METRICS

PRESENTED BY: JP Ross
DATE: NOVEMBER 16 , 2020



METRICS TOOLS

- Local Development Business Plan created metrics and a Scenario Analysis tool, using IMPLAN model to forecast Community benefits of local programs and investments
- The Scenario Analysis tool can be modified to track most of the current approved programs
- Some programs, like Community Innovation grants, Connected Communities, Reach Code support are not as easily incorporated
- Tracking actual benefits requires CRM (customer relationship management tool) to track customer participation while also using assumptions to quantify social, environmental and economic benefits

TRACKING ACTIVITIES

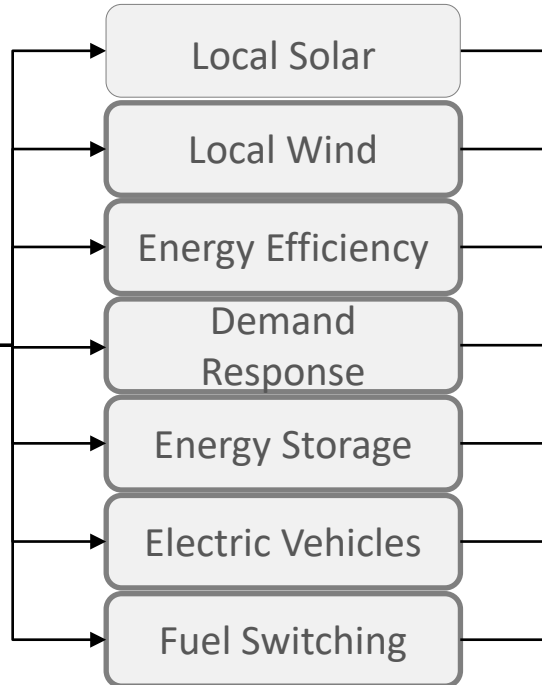
- Modifying Scenario Planning Tool to show benefits of approved programs and other EBCE activities
- Developing and launch Salesforce CRM with program participation tracking capability
- Develop Supplier Diversity Reporting forms for all suppliers (including Local Programs vendors) to track supplier diversity and job creation metrics (GEO 156)
- Develop Program implementer reporting forms that can be loaded into Salesforce to track actuals
- Track program actuals where possible and use scenario planning results when program actuals can't be tracked
- Develop and track social impacts which are not well covered by current framework

IMPLAN LDBP SCENARIO ANALYSIS TOOL

Levers

- MW solar
- MW wind
- \$ investment

Programs



Impact Metrics

- jobs, average wages
- local generation
- surplus revenue
- GHG reductions
- air pollutant reductions

SALESFORCE CRM

- EBCE has selected Salesforce (SF) CRM
 - + AIQUEOUS - a Program Management and reporting application
 - + Pardot – a Marketing Automation tool to facilitate customer outreach, communication and enrollment
- SF with AIQUEOUS and Pardot were selected as tools to help manage customer interactions as well as program enrollment and tracking
 - AIQUEOUS is used by MCE for EE program management and reporting and by PCE for incentive program management
- EBCE customer records are being moved into SF environment and AIQUEOUS will be launched by EoY. Full deployment will continue through 2021

METRICS EVOLUTION

- Some metrics are easier to track than others

Easy	Hard
CARE customer participation	Avoided criteria pollutants from solar/storage/DERs
MW solar deployed	Low income jobs created
\$M invested	Indirect job creation in county

- Models like IMPLAN use agreed upon assumptions to estimate benefits across the community
- Results change as the underlying economy/system changes
 - the GHG benefits of solar have gone down over time as more solar has been deployed and new solar is no longer displacing gas
 - Job creation benefits change as industries scale and employers move

