Northern Rural Energy Network

Mendocino

Fiscal Year 2026 /2027 Workplan

HOME ENERGY ADVISORS PROGRAM

(formerly Residential Equity Program)

Key Performance Indicators

- Educational Outreach Events - 27
- Energy Efficiency Kits Distributed - 200
- Home Energy Consultations & Reports - 50

<u>FY 26/27 Estimated Staff Hours</u>

1,181.5

TASK 1 – ONGOING PROGRAM DEVELOPMENT

- Participate in ongoing program development meetings and attend database training, implementer training, and assessment trainings
- Develop additional public facing Program Documents as needed, such as in-home assessment and installation forms
- Develop procedures for in-person home assessments and installations

TASK 2 – IMPLEMENT PROGRAM

- Work with Program and Marketing Teams to develop and distribute marketing materials through various methods including social media, direct mail, and email.
- Prepare and maintain required Program Documents, including Program Participation Agreement, Installation Agreement: Completed, Program Reports, Customer Feedback Surveys, Customer Service Log
- Enroll customers and confirm eligibility
- Distribute energy efficiency kits
- Conduct phone-based home assessments, analyze data, prepare and distribute energy reports to customers
- Conduct in-person home assessments, analyze data, prepare and distribute energy reports to customers
- Install no-cost measures for customers as appropriate (kit materials)
- Conduct educational activities throughout the county
- Document program activities, store and maintain records consistent with NREN, MCOG, and CPUC requirements and policies.
- Participate in ongoing Program implementation meetings with other partners/implementers. Collect and report CPUC Metrics and Community Engagement Indicators
- Update the Implementation Plan and Program Manual as needed

TASK 3 – RESIDENTIAL NEEDS ASSESSMENT

- Coordinate with consultant and Program Team on needs assessment
- Provide requested data and contacts to the Consultant
- Review final report and create action plan to re-evaluate and adjust program design deliverables as appropriate

TASK 4 – PERFORM CUSTOMER FEEDBACK SURVEYS AND ADDRESS AND RESOLVE ALL CUSTOMER ISSUES

- Obtain customer feedback using the delivery mechanism and methodology developed by the Program Team and included in the PMP
- Report on Customer Feedback and any actions for Program improvement as part of the annual report
- Resolve customer issues and document in monthly reports.

TASK 5 – DATA ENTRY AND REPORTING

- Collect and enter data consistent with Portfolio Administrator requirements
- Prepare and submit quarterly data reports to Portfolio Administrator, including Key Performance Indicator data and educational activities
- Prepare and submit monthly expenditure report to Portfolio Administrator.

HOME ENERGY UPGRADE PROGRAM

(formerly Residential Resource Acquisition Program)

Key Performance Indicators

- Downstream Rebate Projects - 150
- Direct Install Projects - 4

Rebate/Incentive Budget: $149,271

FY 26/27 Estimated Staff Hours: 1,301

TASK 1 – ONGOING PROGRAM DEVELOPMENT

- Participate in ongoing program development meetings and attend database and implementer trainings
- Develop and update public-facing program documents, including participation, proposal, reservation, installation, inspection, completion, and feedback forms
- Develop procedures for direct install delivery, customer enrollment, inspections, and incentive processing
- Finalize/Adjust eligible measures and incentive amounts as needed

TASK 2 – IMPLEMENT PROGRAM

- Work with program and marketing teams to market the program
- Receive, asses, and process downstream rebate applications
- Prepare and maintain required program documents, including participation agreements, installation records, inspection records, customer feedback surveys, and the customer service log
- Implement direct install projects, from customer enrollment and eligibility review through installation, inspection, and project completion
- Issue incentives, document project activity, and store and maintain records consistent with program requirements and policies
- Participate in ongoing implementation meetings with program partners and implementers
- Maintain program KPIs, metrics, implementation documents, and the Program Management Plan in coordination with the Program Team

TASK 3 – PERFORM CUSTOMER FEEDBACK SURVEYS AND ADDRESS AND RESOLVE ALL CUSTOMER ISSUES

- Conduct customer feedback surveys using the approved program methodology
- Report feedback results and program improvement actions in the annual report
- Track and resolve customer issues through the customer service log

TASK 4 – DATA ENTRY AND REPORTING

- Complete accurate data entry in alignment with Portfolio Administrator requirements
- Submit quality-checked quarterly reports and KPI data
- Prepare and submit monthly expense reports

COMMERCIAL ENERGY SERVICES PROGRAM

(formerly Commercial Resource Acquisition)

Key Performance Indicators

- Rebate Projects - 7

Rebate/Incentive Budget: $200,483

FY 26/27 Estimated Staff Hours: 1,075

TASK 1 – PROGRAM DEVELOPMENT

- Hold ongoing program development meetings and attend training on database, implementation, and assessment procedures
- Update KPIs, metrics, implementation documents, and the Program Management Plan in coordination with the Program Team
- Develop direct install processes, including customer engagement, contractor coordination, incentive payment procedures, and EM&V requirements
- Coordinate with program partners on implementation tools, delivery methods, and supporting materials needed for launch

TASK 2 – PREPARE FOR LAUNCH

- Develop program documents, forms, and customer feedback tools needed for launch
- Finalize eligible measures and incentive amounts for rebate and direct install pathways
- Engage stakeholders, prepare marketing materials and website content, and recruit contractor partners to support delivery

TASK 3 – IMPLEMENT PROGRAM

- Work with program and marketing teams to market the program and support customer and contractor engagement
- Prepare and maintain required program documents, including project forms, customer feedback tools, and tracking records
- Implement direct install project pathways, from lead generation and assessments through installation, inspection, and project completion
- Process incentive payments, document project activity, and maintain required program records
- Participate in regular implementation meetings with program partners and implementers

TASK 4 – PERFORM CUSTOMER FEEDBACK SURVEYS AND ADDRESS AND RESOLVE ALL CUSTOMER ISSUES

- Conduct customer feedback surveys and report improvement actions

- Track and resolve customer issues through the customer service log and monthly reporting

TASK 5 – DATA ENTRY AND REPORTING

- Complete monthly and quarterly reporting requirements and maintain accurate records in database
- Submit data entry and KPI reports consistent with Portfolio Administrator requirements

FINANCE PROGRAM

Key Initiatives

- Promote Go Green Financing
- Recruit local lenders
- Explore or establish local lending through a CDFI

Key Performance Indicators

- TBD

Loan Budget Allocation:
2026/27 - $50,000
Total - $100,000

FY 26/27 Estimated Staff Hours: 185

TASK 1 – PROGRAM DEVELOPMENT

- Hold ongoing program development meetings and review consultant recommendations related to program design
- Identify collaboration opportunities with local lenders and Community Development Financial Institutions (CDFI) and develop financing program services in coordination with partners
- Establish KPIs, metrics, and develop the Program Management Plan
- Coordinate with partners on financing pathways, lender participation, and local program delivery options

TASK 2 – PREPARE FOR LAUNCH

- Develop participation agreements, financing applications, and customer surveys
- Set up tracking processes, including database integration, stakeholder engagement, and service coordination
- Prepare marketing materials and website integration needed to support launch

TASK 3 – IMPLEMENT PROGRAM

- Promote Go Green Financing and recruit participating lenders and contractors
- Launch and deliver financing services through a Community Development Financial Institution (CDFI) partner or similar local lending pathway
- Review and process loan applications in coordination with lending partners
- Coordinate customer and contractor referrals and support participation in available financing services

- Document financing program activity and retain program data consistent with reporting requirements
- Participate in implementation meetings with program partners

TASK 4 – REPORTING

- Prepare progress reports and quarterly KPI reports documenting program activities and outcomes

PUBLIC ENERGY SERVICES PROGRAM
(formerly Rural Public Equity Program)

Key Performance Indicators
- Properties Benchmarked - 5
- Project Feasibility Plans - 2
- Resource Referrals - 3
- Assessments - 5
- Funding Referrals - 2

Rebate/Incentive Budget: See Commercial program (public projects qualify under Commercial)

FY 26/27 Estimated Staff Hours: 1,050.5

TASK 1 – ONGOING PROGRAM DEVELOPMENT
- Hold ongoing program development meetings and attend training on database, benchmarking, and assessment procedures
- Adjust KPIs, metrics, program management documents, and service development activities as needed
- Coordinate with the Program Team on tools and processes needed to support public sector services
- Develop and refine service delivery activities and documents that support benchmarking, assessments, feasibility planning, and referrals

TASK 2 – IMPLEMENT PROGRAM
- Market the program throughout the county
- Coordinate outreach, service planning, and technical support with participating agencies and program partners
- Perform needs assessments, facility assessments, benchmarking, infrastructure inventory, and technical support for participating agencies
- Introduce and provide referrals to additional relevant programs and funding sources
- Assist with service applications and grant proposals
- Procure and manage
- Document services provided, project feasibility support, and resource and funding referrals
- Retain program data consistent with MCOG and NREN procedures and participate in implementation meetings with program partners and implementers

TASK 3 – PERFORM CUSTOMER FEEDBACK SURVEYS AND ADDRESS AND RESOLVE ALL CUSTOMER ISSUES
- Conduct customer feedback surveys using the approved methodology and report improvement actions in the annual report
- Track and resolve customer issues through the customer service log and monthly reporting

TASK 4 – REPORTING

- Store data in SharePoint and submit KPI reporting as part of quarterly reports to the Portfolio Administrator

ENERGY CAREER EDUCATION AND TRAINING PROGRAM (ECET) – PROGRAM LEAD

(formerly Workforce Education and Training)

Key Performance Indicators

- Educational Events - 11
- Trainings - 5
- Training Participants - 25
- Work Experience Placements - 2

FY 26/27 Estimated Staff Hours: 582

TASK 1 – ONGOING PROGRAM DEVELOPMENT

- Hold ongoing program meetings, maintain the schedule of activities and overall work plan
- Coordinate with external programs and establish referral and coordination protocols
- Adjust KPIs, program services, implementation documents, and the Program Management Plan as needed
- Research additional partnership opportunities, referral pathways, and potential collaborations such as community colleges, school districts, industry partners, community-based organizations, tribal governments and city and county code compliance departments

TASK 2 – IMPLEMENT PROGRAM

- As regional Program Lead, work with regional partners to establish partnerships and plan and deliver educational workshops and trainings throughout the NREN region
- Coordinate with partners to deliver contractor trainings and Codes and Standards trainings
- Coordinate, produce, and attend educational outreach events that promote energy career opportunities
- Conduct outreach to further develop partnerships with contractors and business owners to establish internship and work experience opportunities
- Develop and distribute educational materials promoting energy career opportunities
- Identify training and professional development opportunities and sponsor attendees
- Conduct ongoing needs assessment activities to determine future training needs
- Document educational outreach and training activities and maintain participant and program records
- Retain program data and participate in implementation meetings with program partners

TASK 3 – PERFORM CUSTOMER FEEDBACK SURVEYS AND ADDRESS AND RESOLVE ALL CUSTOMER ISSUES

- Conduct customer feedback surveys and report improvement actions in the annual report
- Track and resolve customer issues through the customer service log and monthly reporting

TASK – REPORTING

- Track and report KPIs on an ongoing basis as part of regular program reporting