

DOCKETED

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On 8/12/16 Workshop on Barriers of Low-Income and Disadvantaged Communities

Presentation

Additional submitted attachment is included below.

Multifamily Market Overview



**CA ENERGY EFFICIENCY COORDINATING COMMITTEE
STAGE 2 | MULTIFAMILY SUB-SECTOR SESSION**

**APRIL 18, 2016
PG&E PACIFIC ENERGY CENTER
SAN FRANCISCO, CA**

**HEATHER LARSON
STOPWASTE**

Statewide Multifamily Market



- **3.1 million units**¹
- **23% of all CA housing units**¹
- **13% of all national 5+ units**¹
- **Metropolitan: 90% of MF buildings are located in or around LA, SD, OC, SFBA**²
- **Aging: More than 70% before energy codes (1978)**²

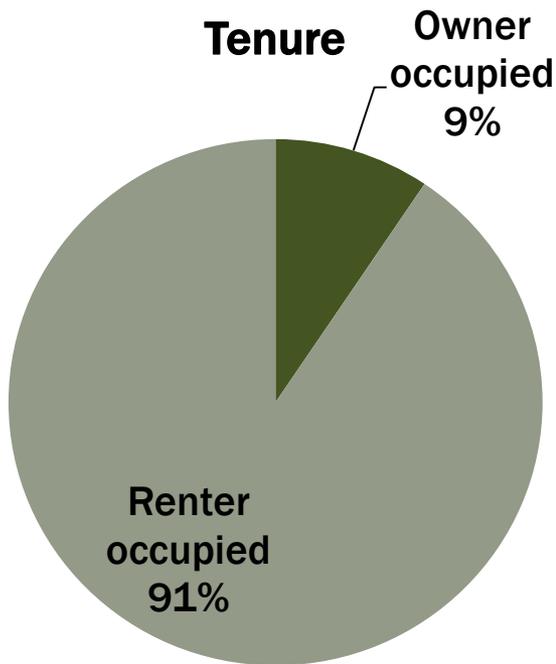


Sources:

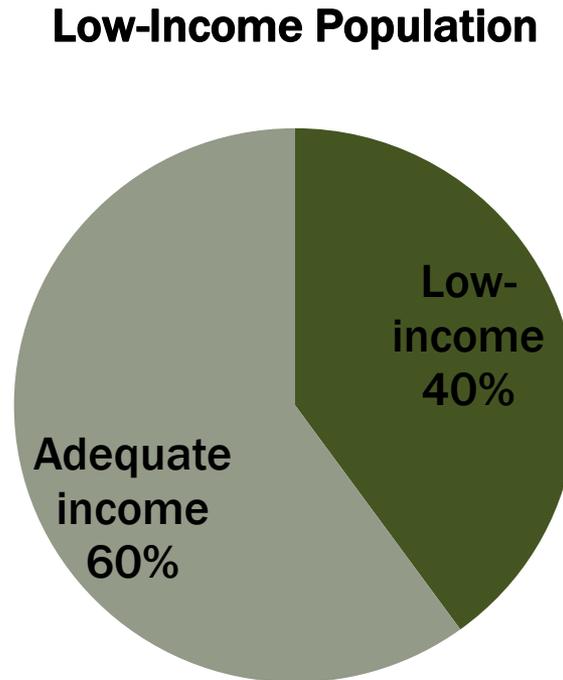
1- 2014 American Community Survey (ACS)

2-CA Existing Building Energy Efficiency Action Plan (EBEEAP)

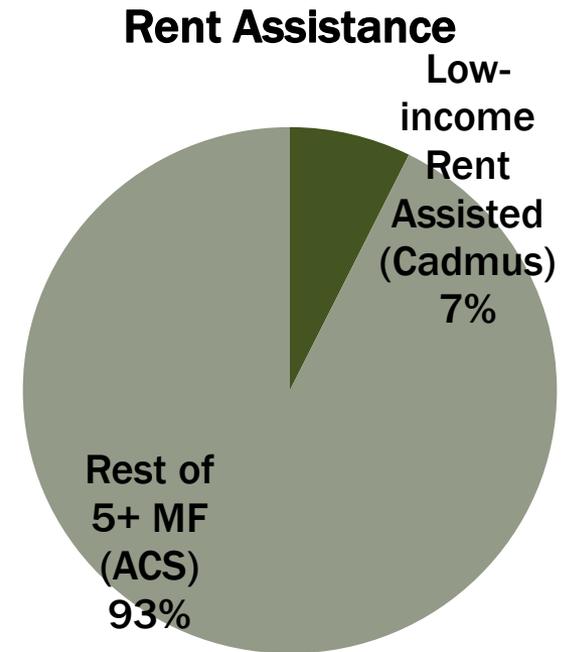
Ownership & Affordability



Source: ACS

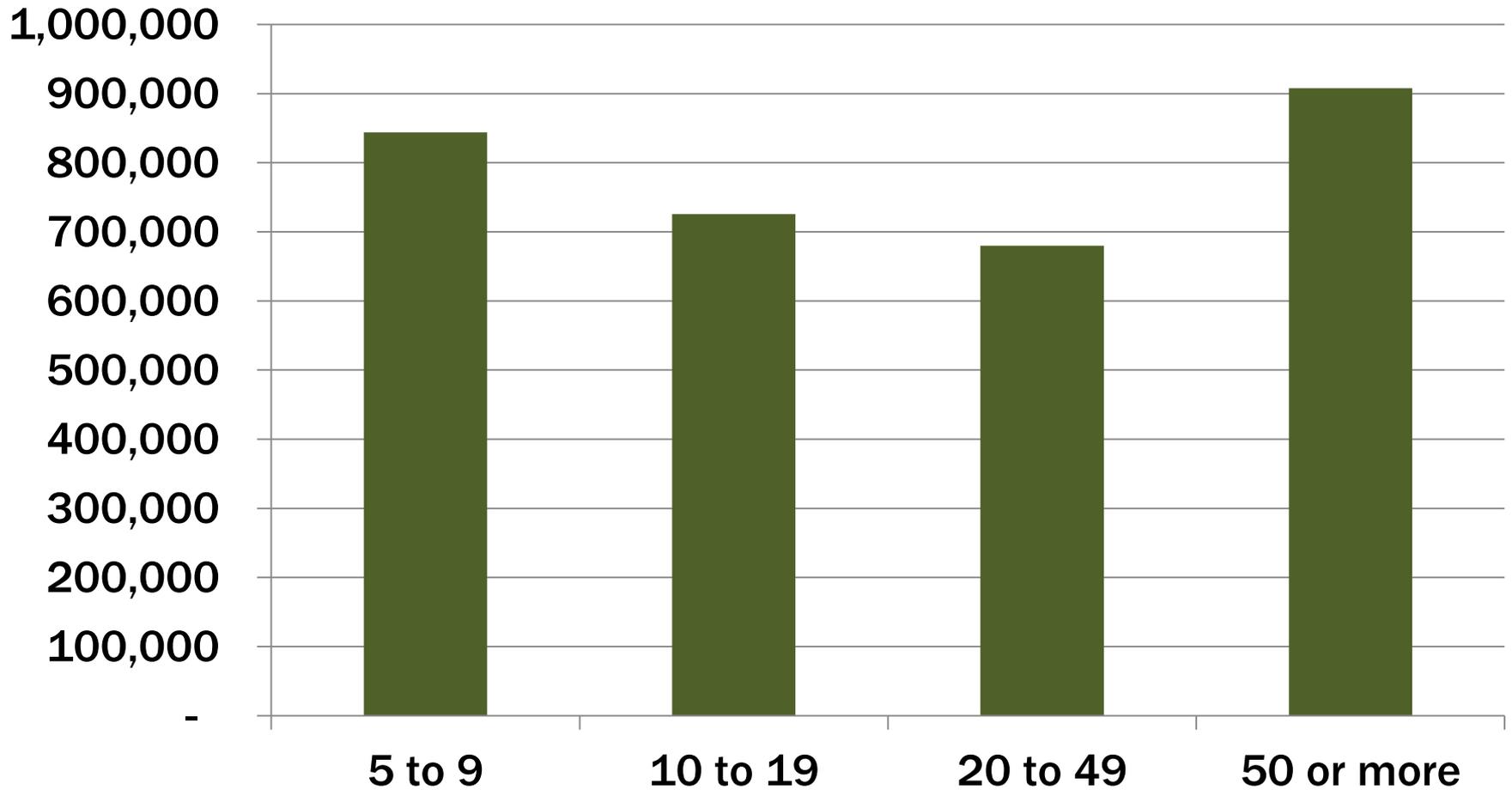


Source: EBEEAP, ESA Study (Cadmus)



Sources: ESA Study (Cadmus) & ACS

Distribution of Units by Building Size

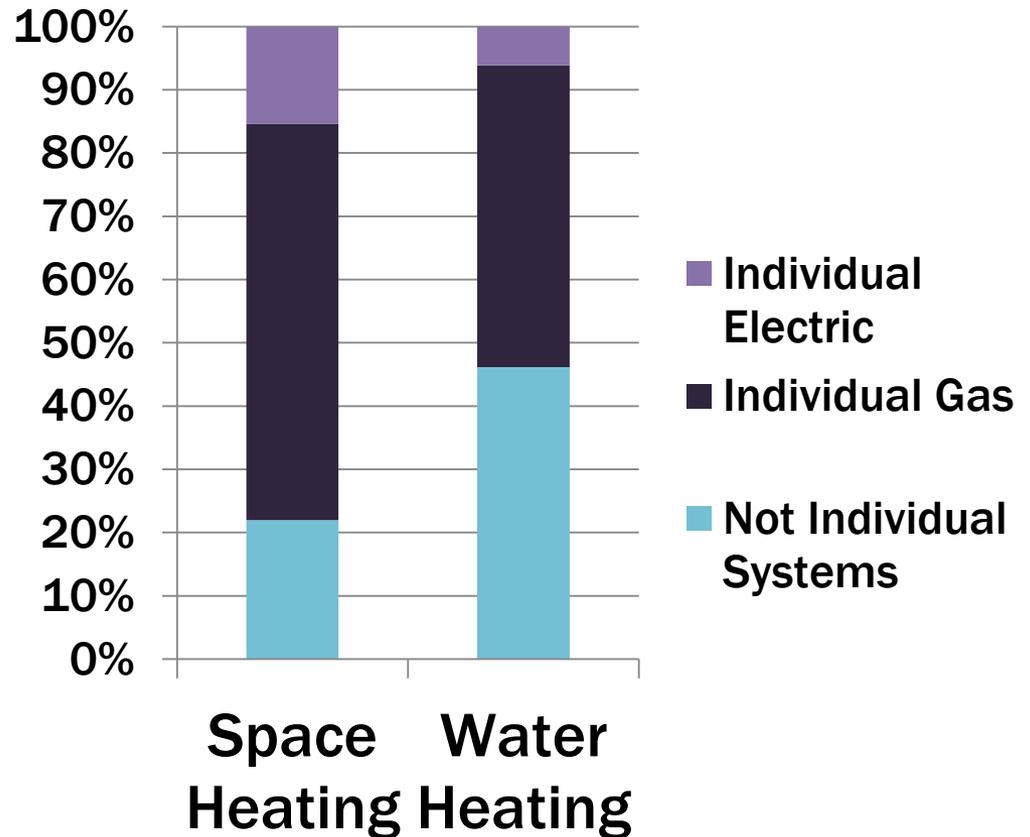


Source: 2014 ACS

Energy Use Profile



- **Major end uses:**
72% of total site energy is water heating and distribution (39%), space heating (22%) and lighting
- **Savings potential:**
30% improvement saving \$9B nationally



Source: CA Existing Building Energy Efficiency Action Plan (EBEEAP)

Source: 2010 California Residential Appliance Saturation Survey

ACEEE Recommendations



1. **Segment** the market
 - Market-rate, affordable, condos, student housing, etc.
2. Provide a **one-stop shop** for program services
3. Integrate direct installation and larger rebate programs
4. Provide **financing** options
5. **Streamline** rebates for owners—include incentives for residents
6. **Coordinate** among electric, natural gas, water utilities

ACEEE Recommendations



7. Encourage deeper retrofits by **escalating incentives** to achieve higher savings
8. Combine utility incentives with public funding available at time of **affordable housing refinance**
9. Partner with local MF housing industry to **market programs directly** to building owners and managers
10. Offer **multiple pathways** for participation to reach and serve more buildings

MF HERCC 2013-2015 Lessons Learned



Solution	Problem Addressed
<p>Streamline program participation process Customer engagement, delivery model, program coordination, H&S/QA, contractor qualifications</p>	<p>Excessive paperwork, requirements, and piece-meal programs deter participants QA requirements perceived as onerous MF CAS is expensive, lacking protocols</p>
<p>Refine incentive structures Simple and flexible Streamlined energy modeling</p>	<p>High up-front energy audit costs Owners need incentive \$ before investing in project design</p>

MF HERCC 2013-2015 Lessons Learned



Solution	Problem Addressed
<p>Increase marketing effectiveness</p> <p>Green labeling & disclosure Targeted marketing & outreach Cohort/portfolio approach</p>	<p>Lack of market recognition of value of energy efficiency Sector diversity requires targeted & tailored marketing & messaging Industry needs to see peer examples</p>
<p>Increase operational savings</p> <p>Property management training Monitoring, retro-commissioning</p>	<p>Operational savings left behind Long-term relationships hindered by lack of engagement in ongoing operations</p>
<p>Increase accessibility of whole building energy data</p>	<p>Upgrade recommendations made in absence of energy usage data Energy modeling not calibrated Actual energy savings not monitored</p>

MF HERCC 2013-2015 Lessons Learned



Solution	Problem Addressed
Improve electric vehicle charging infrastructure	Missed opportunity to leverage property owner engagement to cross-promote multiple benefits
Promote water efficiency upgrades Co-promote high-impact water measures PAYS®/Water Bill Savings Program	Missed opportunity to use of other interests to promote energy efficiency

Multifamily Policy Context



- **AB 802 Data & Disclosure**
- **AB 758 Existing Buildings EE Action Plan (EBEEAP)**
- **AB 327 CARE rates**
- **AB 693 Multifamily Affordable Solar Housing**
- **CPUC proceedings with MF specific issues**
 - Distributed Generation
 - Net Energy Metering
 - CARE/ESA

Thank You



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