

Southern California Regional Energy Network

Implementation Plan

SoCalREN Multifamily Program

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1. Program Budget and Savings Information

a. Program Information

Program Name	SoCalREN Multifamily Subprogram
Program ID#	SCR-RES-A1

b. Program Implementer

Program Implementor	Yes
SoCalREN Only	
SoCalREN – Statewide Lead	
Other PA – Statewide Lead	
Third Party	X
Other	

c. SoCalREN Business Plan Sector

SoCalREN Business Plan Sector	Yes
Residential	X
Commercial	
Industrial	
Agricultural	
Public	
Codes & Standards	
Workforce Education & Training	
Finance	
Other	

d. Program Type

Program Type	Yes	No
Resource	X	
Non-Resource		X

e. Intervention Strategies

Primary Intervention Strategy	Yes	No
Upstream		X
Midstream		X
Downstream	X	
Direct Install		X

f. Projected Program Budget

Budget data on CEDARS?: ☒ Yes ☐ No If No, then show below:

g. Savings Impact

Budget data on CEDARS?: ☒ Yes ☐ No If No, then show below:

h. Program Effectiveness

Budget data on CEDARS?: ☒ Yes ☐ No If No, then show below:

2. Implementation Plan Narrative

a. Program Description

The Southern California Regional Energy Network (SoCalREN) Multifamily Program (the Program) touches a number of stakeholders, from the utility service provider to multifamily property owners and their tenants. The Program provides business opportunities for consultants, equipment suppliers, and energy efficiency contractors. Program objectives, as stated in the 2019 Joint Program Administrator Joint Cooperation Memo, include:

- Cost-effectively improve the efficiency of multifamily buildings through custom comprehensive retrofits
- Provide a turnkey solution with financial incentives so property owners can adopt new and more efficient technologies and/or equipment, thus reducing energy waste
- Leverage cross-cutting companion SoCalREN programs to drive participation in energy efficiency upgrades
- Primarily target multifamily properties classified as hard-to-reach or located in Disadvantaged Communities (DACs)

In addition to the cost-saving benefits of energy efficiency (for both owners and tenants), residents can benefit from a safer, healthier, and cleaner living environment. Building owners can also enjoy increased property values and command higher rents in market-rate buildings. Education around energy efficiency can help tenants and building operators adopt sustainable practices in other areas of their lives, such as work or transportation. The successful completion of a Multifamily project that addresses the needs of stakeholders at all levels is an effort that is meaningful both financially and toward conserving the earth's resources.

The primary target audience for the Multifamily program is owners and managers of eligible multifamily properties located within the SoCalREN service area. This includes a wide range of property types, from large corporate operations with multiple property sites to individual owners of single properties. Secondary audiences include building professionals (contractors who serve multifamily properties in SoCalREN service area), and other trade allies such as industry associations and product distributors/technology providers. In addition, the Program provides messaging and tools to help educate tenants in participating properties about the Program, as well as general information about incorporating energy-saving behavior and habits in their homes.

b. Program Delivery and Customer Services¹

In 2020, SoCalREN has a goal to deliver approximately 8 GWh in energy savings (see chart below).

	Gross	Net
kWh	8,212,699	6,231,754
kW	1,507	1,120

¹ IP Guidance from D.15-10-028: "Describe how the energy efficiency (EE) program will deliver savings (upstream, downstream, direct install, etc.), how it will reach customers, and the services and [sic] it will provide."

Therms	252,749	190,573
Budget	\$6,475,000	

Projects will be brought to the Program through a combination of direct sales through program staff and participating contractors who are fully supported by a SoCalREN branded marketing effort. All projects will receive an energy assessment that will provide a review of potential opportunities, outlining energy savings potential and payback of each measure. Once a project is complete, the owner will then receive an incentive for the work completed.

The program features a tiered incentive structure that provides increased incentives for greater levels of efficiency achieved. The incentives are determined based on the qualified savings percentage above baseline energy usage and multiplied by the number of residential units. The incentive is capped at the lesser of the per unit incentive or 60% of the project cost for non-Disadvantaged Community (DAC) properties and 75% of project cost for DAC properties.

All projects will receive support materials, such as tip sheets, tenant notification door hangers, lobby signs, and refrigerator magnets to support the project and provide tenant education.

Marketing and Outreach

Generating awareness of and interest in the SoCalREN Multifamily program requires a variety of complementary efforts – from digital advertising tactics and marketing collateral to direct contractor outreach and one-on-one conversations with property managers who contact the program. Both the Program team and participating Contractors act as the Program’s primary sales force, using the various Program offerings to sell cost-effective retrofit services to multifamily properties.

Messaging

Consistent program messaging across marketing and outreach tactics is key to driving interest and participation. The messaging used to sell the program to property managers and owners includes:

- Increased value of property
- Reduced operating costs (ongoing money savings)
- Financial incentives
- Ease of participation with the guidance and support of a Program Account Manager
- Improved tenant safety, comfort, and retention
- Corporate social responsibility/environmental impacts

Engagement Channels

Specific marketing and outreach strategies employed to engage target audiences include:

Program Website: Located at socalren.org/multifamily, the program website provides eligibility information, program benefits, resource documents for Contractors, and an Interest Form that property owners/managers can complete to initiate contact with the Program team.

Industry Association Advertising: To engage with key stakeholders, the Program will place print and online advertisements with select Multifamily industry associations that support the areas served by SoCalREN.

Industry Association Events: The Program will participate in select Industry Association Events. These events offer Program staff the opportunity to engage in one-on-one conversations with interested property owners and managers as well as other trade allies and industry professionals.

Direct Mail and Email: The Program will conduct targeted direct mail campaigns during 2020. Using ALN and CoStar online databases, mailing lists targeting Hard-to-Reach (HTR) and DAC communities, large property management companies, and small (50 units or fewer) multifamily communities will be developed, and SoCalREN branded postcards with program messaging will be distributed to these targeted groups.

Social Media: Specific posts regarding the multifamily program, attendance at industry events, and more will be shared on social media throughout 2020. In addition, SoCalREN will engage with industry groups on Social Media, increasing the reach of our posts and program messaging.

Marketing and Event Collateral: A variety of program overviews, FAQ, tip sheets, leave-behind pieces and other marketing and event collateral will be provided to educate property owners and managers, and Contractors, and tenants about the program and the overall benefits of energy efficiency. For tenant-facing materials, English and Large Print options will be made available to ensure the Program's message can reach all tenant audiences.

Residential Community Coordinator (RCC): The RCC provides in-language outreach and ongoing support services to potential and participating customers who speak a language other than English. RCC strategies include advertising placements with in-language publications and development of in-language collateral pieces.

The RCC will also oversee the outreach activities of partners in SoCalREN's territory that traditionally have a lack of customer participation. These partners will work with the RCC to create an outreach strategy that will be suited for their region to promote the Multifamily Program. This will include identifying potential introductions to contractor and community groups for SoCalREN Program presentations, as well as invitations to local events and meetings attended by potential Program participants.

The RCC will provide marketing collateral for distribution in multiple languages and pre-developed content that is easily shareable in publications and social media. Materials are provided in Spanish and simplified Chinese with additional languages (e.g. Vietnamese and Korean) developed upon request by property managers.

c. Program Design and Best Practices

The goal of the SoCalREN Multifamily program is to help customers save energy, improve tenant comfort, and reduce ongoing maintenance costs. There are two paths that a project can follow.

Whole Building Path

The Whole Building Path addresses the entire property and includes both in-unit and common area retrofits. Project requirements are as follows:

- Building must have at least five attached units
- Retrofit must include a minimum of three energy efficiency measures
- Customers of either Southern California Edison (SCE) or SoCalGas®
- Installed measures must achieve a minimum of 10% energy savings

- Permits are required if applicable by the jurisdiction and/or SB 1414

The steps to participation are as follows:

1. Properties enroll in the program by completing a Property Owner Agreement and providing access to recent 12 months of utility usage data for service account validation.
2. An energy assessment is used to establish baseline energy usage and identify cost-effective upgrade options. Energy savings achievable from those measures are modeled in EnergyPro.
3. Properties install qualifying energy efficiency measures using Participating Contractor(s) of their choice. Contractors must be licensed in their trade and comply with all state and local codes.
4. Properties earn incentives up to \$1,200 per unit for qualifying improvements meeting minimum energy savings requirements (please see detailed incentive structure in Section 3.b.).

Common Area Path

In response to COVID-19, SoCalREN implemented the Common Area Path to minimize contact with property residents. This path is exclusively focused on common area projects that meet the following requirements:

- Building must have at least five attached units
- Retrofit must include a minimum of two energy efficiency measures with at least one being an electric measure
- Customers of either Southern California Edison (SCE) or SoCalGas®
- Installed measures must achieve a minimum of 4% energy savings
- Permits are required if applicable by the jurisdiction and/or SB 1414

The steps to participation are as follows:

1. Properties enroll in the program by completing a Property Owner Agreement and providing access to recent 12 months of utility usage data for service account validation.
2. An energy assessment is used to establish baseline energy usage and identify cost-effective upgrade options. Energy savings achievable from those measures are modeled in EnergyPro.
3. Properties install qualifying energy efficiency measures using Participating Contractor(s) of their choice. Contractors must be licensed in their trade and comply with all state and local codes.
4. Properties earn incentives of 45% of the project cost for DAC and 35% for non-DAC.

Electric Measure Only Path

During the 2021 program year, the SoCalREN Multifamily Program has observed widespread disruptions in the economy from COVID-19 that have constrained supply chains, and led to increased difficulty for participating contractors to receive and install equipment in accordance with program timelines. In response to these impacts, an electric measure only path was offered to contractors during the fourth quarter of 2021.

This path allows contractors to install measures that are less impacted by supply chain disruptions and continue to provide energy efficient retrofits to multifamily properties within the service territory. The existing rules of the SoCalREN Multifamily Program were modified to accommodate the measure types and their associated energy savings. The modified program rules are set to expire 12/31/2021.

Information about measures, incentives, and energy savings for the electric measure only path are as follows:

1. Electric measure only path projects do not need their installed measures to achieve a minimum of 10% energy savings during the fourth quarter of the 2021 program year.
2. Electric measure only path projects that have installed measures below 10% energy savings will receive an incentive at an average rate of \$0.90/kWh (net).
3. Electric measure only path projects that achieve 10% energy savings will be subject to the regular program incentive rates.
4. Electric measure only path projects do not need their retrofits to include a minimum of three energy efficient measures.

Residential Community Coordinator

The RCC Program is designed to increase DAC and HTR participation in the Multifamily Program through a dedicated marketing and outreach effort focused on the cultural and language diversity of this segment. The RCC acts as a single point of contact (SPOC) to overcome the additional cultural and language barriers that prevent widespread engagement by the HTR segment. The participation steps are the same for the Whole Building and Common Area paths with the added support of the SPOC to help shepherd HTR customers through the process by providing a level of trust and support that instills confidence in the process.

Best Practices

The SoCalREN Multifamily Program addresses the following market barriers to comprehensive upgrades, and implements best practices to mitigate these potential barriers:

Lack of accessible analytical reports. Lack of in-house technical expertise. The Program will provide an assessment that details the opportunities for energy efficiency and provides information about the potential financial impacts of implementing those measures. The assessment report details pre-existing conditions, measure recommendations, minimum specifications/efficiency required, estimated measure costs, and the payback of the associated measures with and without incentives. The report also details which measures are recommended as high, medium and low priority, based on the cost and benefit. The simple, easy to understand report is a best practice, and serves as a tool to help owners make decisions regarding their property.

Lack of access to affordable capital to pursue upgrading opportunities. Through the complementary Multifamily Financing Program (MFF), the Program will connect property owners with financing options to help overcome project cost barriers. The MFF program broadens access to financing for more multifamily property owners/contractors for energy efficiency upgrades by allowing a financial institution partner to modify its underwriting criteria and accept more risk than it would otherwise on qualified projects. The Program design incorporates a credit enhancement that will reduce the borrowing rate for the borrower and the design incorporates features that make the program process easy for the borrowers, financial institutions, contractors, and the Program Administrator, therefore encouraging investments in energy efficiency. The MFF program is described in more detail in the Implementation Plan for SCR-FIN-C2.

Diversity of building types, which prevents a single approach for all buildings. This program provides site-specific Energy Assessments that will recommend measures appropriate to the needs of the specific property. A custom report is a necessity, as there is a wide variety of retrofit opportunities in Southern California.

Split incentives that prevent property owner investments and prevent tenants from receiving energy efficiency benefits. The Program offers incentives for both common area and in-unit efficiency measures. A financial analysis of payback is provided for all individual measures in order to help ownership make the decision on which measures to install. The split incentive provides a challenge in both residential and commercial markets, so developing strategies around mitigating the challenges split incentive issues present is crucial. SoCalREN is continually providing guidance to property owners, and continually developing strategies to provide services to both tenants and owners.

The SoCalREN Multifamily Program will continuously review its program processes and adjust its design accordingly. Feedback from participants, implementers, EM&V, CPUC, other multifamily program administrators, and other stakeholders will inform revisions to the program design.

d. Evaluation, Measurement, and Verification (EM&V):

Information and data points are collected throughout the entire process of participation for a multifamily property. SoCalREN gathers information during the outreach phases, collecting data on potential customers reached and effectiveness of outreach methodologies.

The first step in the process is to enroll in the Program. At this stage, basic eligibility information such as site contact information, building address, contractor information, and 12 months of utility billing data is reviewed. During this phase, the level of customer interest is gauged through direct conversation to

determine their overall level of engagement and capacity to move forward with retrofits.

The contractor completes an intake form that includes basic eligibility information and building-specific information. Information is also gathered on the tenant mix, including whether the property qualifies as DAC or HTR. Program staff then gathers in-depth information about the property during the assessment process. This assessment validates the existing conditions of the property and collects any additional data needed to produce the EnergyPro model.

Once the site assessment is completed, a baseline usage model is prepared to establish existing conditions. An assessment report is then prepared that provides recommendations for energy savings improvements for typical Whole Building (e.g. indoor/exterior lighting, faucet aerators/showerheads, thermostats, domestic hot water boilers) and Common Area measures (e.g. exterior lighting, pool/spa and domestic hot water heating). The estimated savings and percent of baseline usage are provided for each recommended measure so the property owner can make decisions on what measures to install to meet the minimum savings level (i.e. 4% for common area and 10% for whole building).

Customers then complete their project using a participating program contractor. When a project is complete, final savings, incentives and program cost-effectiveness are reported to the CPUC.

Throughout the project process, the information, data and metrics captured are stored in the program Customer Relationship Manager (CRM) for ease of reporting. A dashboard is kept current so current statuses and pipeline can easily be reviewed by the Program Administrator.

e. Program Performance Metrics

The metrics gathered in the Multifamily Program are as follows:

Financial

- Funds reserved during the reporting period (calendar year)
- Checks issued to customers during the reporting period (calendar year)
- Funds remaining from the budget during the reporting period (calendar year)
- Cost per kWh/kW/therms of energy saved
- Project costs (before incentives)
- Incentives issued per project
- Average values per project (cost, incentives, etc.)
- Overall project cost-effectiveness

Project Data

- Size of projects (# of units)
- Site information (# of buildings, # of residential units, total square footage, etc.)

Energy Savings

- kWh saved per project
- kW saved per project
- Therms saved per project

¹ IP Guidance from D.15-10-028: "It is in the implementation plans that we want to see at least one metric for each program/strategy/sub-sector/intervention strategy; more than one where appropriate.... Implementation plans will contain metrics, as already discussed. PAs are free to start with a clean slate in developing metrics and associated reporting requirements, but for all programs will continue to provide monthly cost reports, and for resource programs will provide monthly savings data as well."

- Overall program savings during the reporting period (calendar year)
- Project pipeline savings (anticipated savings of future projects in the pipeline)

Contractors

- Number of contractors actively submitting projects to the program

f. Quantitative Program Targets

In 2020, SoCalREN has a goal to serve approximately 80 projects representing 13,500 units. This volume is expected to deliver the goal of 6,231,734 net kWh 1,120 net kW and 190,573 net therms.

SoCalREN has expressed its focus on serving DAC properties, and has established a goal of 50% of projects being completed in DAC territories or approximately 40 projects in 2020.

In order to deliver the quantity of project needed to reach goal, the SoCalREN has a goal of keeping at least ten contractors enrolled in the program and delivering projects.

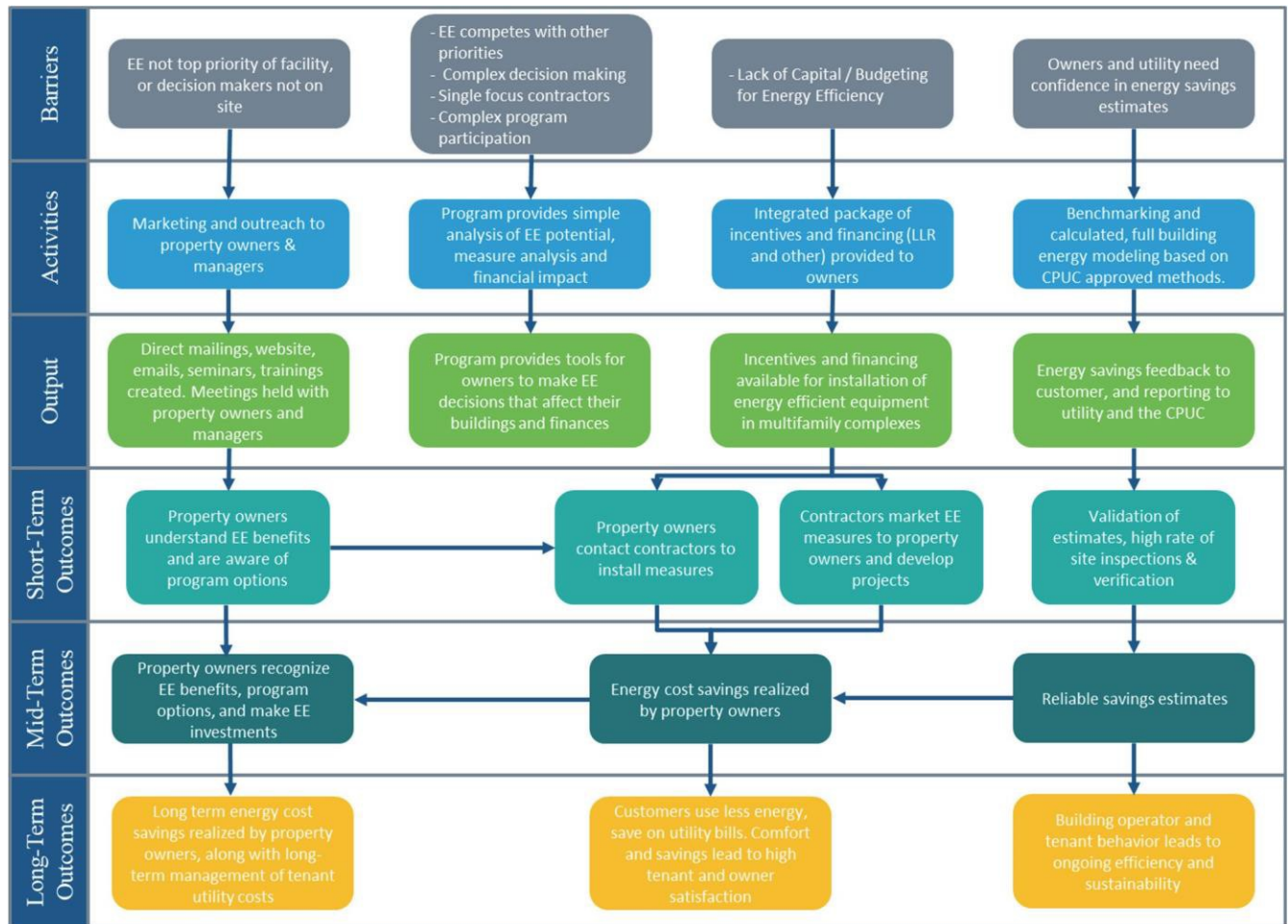
SoCalREN has set a goal of enrolling 10 customer projects through the RCC efforts. These projects will be identified through a variety of direct customer engagement including seminars and community events, as well as print advertising in Spanish and Chinese language publications.

g. Pilots

No pilots are planned for 2020.

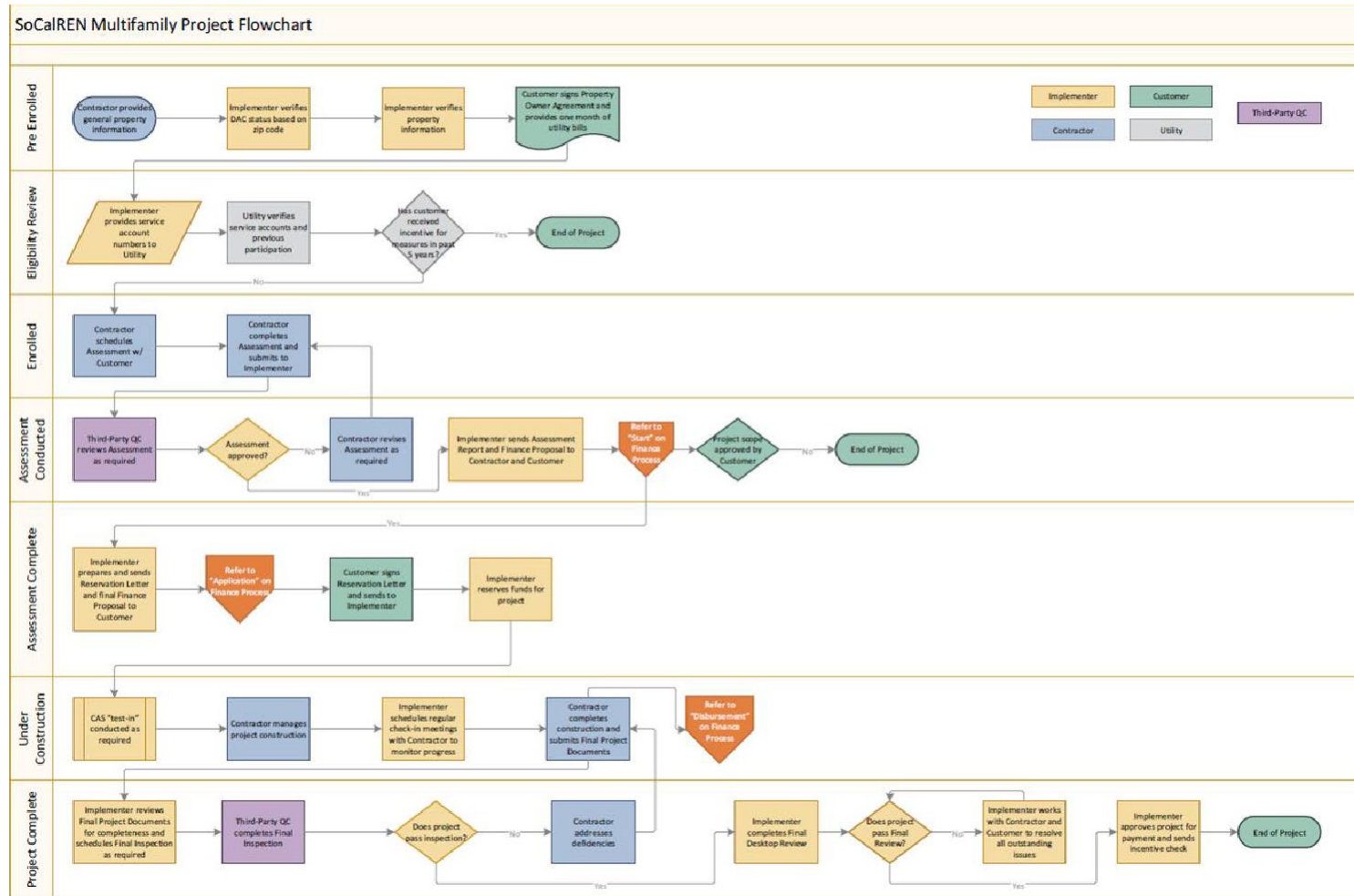
h. Program Logic Model

The Logic Model for the SoCalREN Multifamily Program is displayed below:



i. Process Flow Chart

The Process Flow Chart for the SoCalREN Multifamily Program is below:



j. Diagram of Program



k. Additional information

Decision Addressing Workforce Requirements and Third-Party Contract Terms and Conditions, Decision 18-10-008 October 11, 2018, states that the minimum workforce standards apply “to large non-residential HVAC and lighting controls projects (p. 71).” It further states that “all projects involving installation, modification, or maintenance of heating, ventilation, and air conditioning (HVAC) measures in non-residential buildings (p. 76)” are subject to the standards. Therefore, the Workforce Requirements do not apply to this Residential Multifamily Program.

I. For Market Transformation Programs Only³**i. Quantitative Baseline and Market Transformation Information**

Provide quantitative information describing the current EE program baseline information (and/or other relevant baseline information) for the market segment and major sub-segments, as available.

Not applicable for 2020.

ii. Market Transformation Strategy

Provide a market characterization and assessment of the relationships and/or dynamics among market actors, including identification of the key barriers and opportunities to advance DSM technologies and strategies. Describe the proposed intervention(s) and its/their intended results, and specify which barriers the intervention is intended to address.

Not applicable for 2020.

³ Codes & Standards program, Emerging Technologies program, Workforce Education & Training program, etc.

3. Appendix: Supporting Information and Documents

a. Program Manuals and Program Rules

All information required in the table below is detailed in the SoCalREN Multifamily Program Manual.

Table 1. Supportive Materials Index

#	Information Required	Short Description	Location Name/URL link
1	Eligible Measures or Measure Eligibility	A list of eligible measures, or measure eligibility requirements	Included in Program Manual
2	Customer Eligibility Requirements	Requirements for program participation (for example, annual energy use or peak kW demand)	Included in Program Manual
3	Contractor Eligibility Requirements	List of any contractor (and/or developer, manufacturer, retailer or other "participant") eligibility requirements. (For example: specific IOU-required training courses, specific contractor accreditations, and/or specific technician certifications.)	Included in Program Manual
4	Participating Contractors, Manufacturers, Retailers, Distributors	Information as to whether: <ul style="list-style-type: none"> • Program or sub-program delivery channel is downstream, midstream, or upstream, and • Program is an incentive and/or buy-down type program. 	Included in Program Manual
5	Additional Services	Descriptions of any additional sub-program delivery, measure installation, marketing and outreach, training, and/or other services provided, if not yet described above.	Included in Program Manual
6	Audits	Information as to whether: <ul style="list-style-type: none"> • Pre- and post-audits are required • Funding or incentive levels have been set for audits, and • The eligibility requirements for audit incentives. 	Included in Program Manual
7	Sub-Program Quality Assurance Provisions	List of quality assurance and quality control requirements, including accreditations and/or certifications or other credentials of individuals or organizations performing this work.	Included in Program Manual
8	Post Inspections	Post Inspections are required for select projects.	Included in Program Manual

b. Incentive Tables, Workpapers, Software Tools

The Program incentive structure varies by the project path.

Whole Building Path

The Whole Building Path features a tiered incentive structure, providing increased incentives for greater levels of efficiency achieved. The incentives are determined based on the qualified savings tier and multiplied by the number of residential units. The incentive is capped at the lesser of the per unit incentive value or 60% of the project cost for non-Disadvantaged Community (DAC) properties (or 75% of project cost for DAC properties). A chart illustrating the savings levels and associated incentive level is below.

% Savings	Incentive per Unit	% Savings	Incentive per Unit
10	\$ 550	21	\$ 913
11	\$ 583	22	\$ 946
12	\$ 616	23	\$ 979
13	\$ 649	24	\$ 1,012
14	\$ 682	25	\$ 1,045
15	\$ 715	26	\$ 1,078
16	\$ 748	27	\$ 1,111
17	\$ 781	28	\$ 1,144
18	\$ 814	29	\$ 1,177
19	\$ 847	30	\$ 1,200
20	\$ 880		

Common Area Path

The incentive structure for the Common Area Path is based on paying a percentage of the total project cost. For DAC projects, the program reimburses the customer 45% of the approved project cost and for non-DAC projects, the program reimburses the customer 35% of the approved project cost. To ensure reasonableness, the program maintains a project cost database with established measure costs based on historical program data and external data sources such as approved workpaper IMCs and RS Means.

Program Measures

SoCalREN provides a list of approved measures to guide property owners and contractors in determining a potential scope of work for the property. However, any CPUC-approved measure can be incorporated provided the measure is approved by the Program Implementer prior to installation. Measures with work papers and/or disposition may be considered.

Note: Due to the Program using custom calculations, varying degrees of efficiency may be considered.

SoCalREN Multifamily Measure List

Category	Measure Type
Insulation	Attic insulation
Insulation	Wall Insulation
Insulation	Floor Insulation
Envelope	Windows
HVAC	Duct Sealing
HVAC	Duct Insulation
HVAC	Efficient Fan Controller for AC and Furnaces
HVAC	Smart Thermostat
HVAC	Brushless Fan Motor
HVAC	Fan Delay Controller
HVAC	Package Terminal Air Conditioner and Heat Pump
HVAC	Room (or through the wall) Air Conditioner
HVAC	Variable Refrigerant Flow Ductless Heat Pump
HVAC	Water Source Heat Pump
HVAC	Room (or through the wall) Heat Pump
HVAC	High Efficiency Furnace
HVAC	Gravity Wall Furnace
HVAC	Split/Package Air Conditioner and Heat Pump
HVAC	Radiant/Hydronic Heating
Water Heating	ENERGY STAR® Electric Storage Water Heater
Water Heating	High Efficiency Domestic Hot Water (DHW) Boilers
Water Heating	High-Efficiency Natural Gas Storage Water Heater
Water Heating	Water Heater Insulation (Wrap/Jacket)
Water Heating	High-Efficiency Natural Gas Instantaneous Water heater
Water Heating	Variable Speed Circulation Pump for DHW High-Efficiency boilers
Water Heating	Central Boiler Recirculation Control
Pools	Efficient Pool/Spa Boiler
Pools	Variable Speed Pool Pump
Solar	Solar Thermal
Space Heating	Central System Boiler for Space Heating
Appliance	High-Efficiency Refrigerators
Appliance	High-Efficiency Washing Machines
Appliance	High-Efficiency Clothes Dryers
Appliance	High-Efficiency Dishwashers
Cool Roof	Residential Cool Roof
Lighting	Interior Lighting
Lighting	Exterior Lighting

Water-Efficient Fixtures	Showerheads, bathroom faucets, kitchen faucets
On-Demand Recirculation Pump	Recirculation pump
On-Demand Recirculation Pump	Recirculation pump controls
Other	Advanced Power Strips
Elevators	Elevator Motor Replacement
Elevators	Elevator Shaft Air Sealing
Elevators	Software based controls instead of electromechanical relays
Elevators	Idle/sleep mode, turn off lights, ventilation when unoccupied
Elevators	Destination control software to batch requests for fewer stops and reduce wait time
Elevators	Regenerative drives
Elevators	Advanced gearless drive systems
Elevators	Machine roomless (MRL) traction elevators
Other Measures	Other measures with work papers and or disposition may be considered

Eligible measures include any measures whose savings can be estimated using CPUC-approved calculation methodologies, including Database of Energy Efficient Resources (DEER) deemed savings, EnergyPro software, and reviewed external engineering calculations. The full list of such measures is extensive, and a short list of common measures is provided above for illustration purposes.

Ineligible Measures:

The following measures are explicitly identified as being ineligible to count toward the calculated energy savings:

- Solar photovoltaic (electricity generation)
- Power correction measures
- Behavioral measures
- Below-code measures