



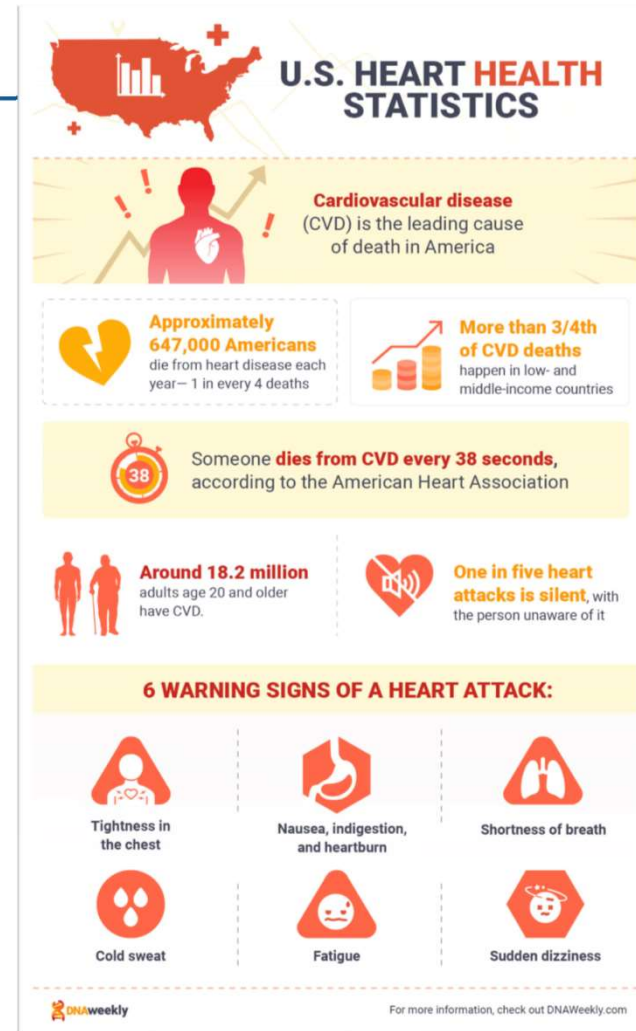
Energy Savings Assistance Program (ESA) Southern Multifamily Whole Building (MFWB)

Implementation Plan Public Presentation

February 16, 2023

SAFETY MESSAGE

- February is Heart Health Month
- Tips for Maintaining a Healthy Heart:
 - Eat Healthy
 - Be Physically Active
 - Track Heart Statistics
 - Manage Stress
 - Get Sufficient Sleep
 - Stop Smoking



INTRODUCTIONS



Cynthia Rafferty
Chief Executive Officer



Austin Myatt
Director



Fatima Salcido
Senior Manager

WEBINAR LOGISTICS

- **The meeting is conducted through Slido: [Southern MFWB IP Public Presentation](#)**
- **Presenters will not be able to hear you**
- **Questions will be asked through the Slido app**
 - Ask your question within the Q&A tab
 - Questions posted will be anonymous
 - The Platform will stay open until February 16, 2023, at 5pm (PT)
- **SDG&E will post responses to Q&A on February 21, 2022, at 5:00 PM PT**
- **All questions are logged and recorded**
- **All official responses and link to recorded webinar will be posted on**
 - SDG&E's Solicitation website: www.sdge.com/energy-savings-assistance-programs-solicitations
 - California Energy Efficiency Coordinating Committee (CAEECC)
 - California Energy Data and Reporting System (CEDARS)

AGENDA



Program Overview

- CPUC Direction
- Program Partners
- Program Objectives
- Program Goals
- Program Budget
- Program Summary
- Process Overview
- Measure Categories
- Workforce Development



Customer Journey

- Disadvantaged Communities
- Customer Segments and Need States
- Marketing and Outreach
- Deed-Restricted Building Eligibility
- Non-Deed Restricted Building Eligibility
- In-Unit (Tenant) Eligibility



Other Program Information

- Key Performance Metrics
- Timeline to Launch
- Program Contacts
- Additional Program Resources



Questions?



PROGRAM OVERVIEW

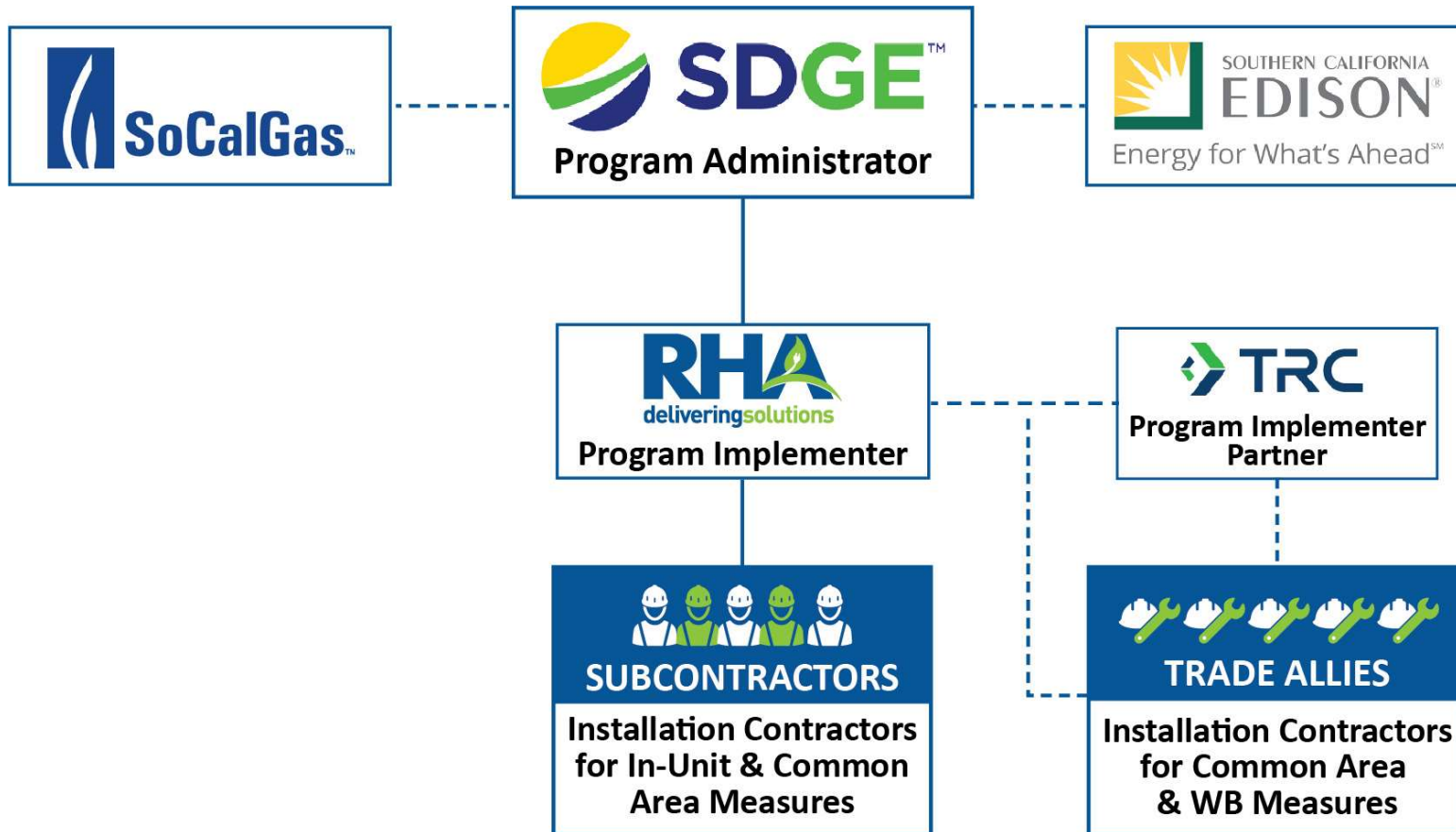
CPUC DIRECTION

- **The CPUC directed in D. 21-06-015 that the ESA Program serve eligible multifamily buildings and tenants through a combined multifamily whole building comprehensive offering.**
 - Previously, the ESA program served multifamily in-unit customers while the Common Area Measures (CAM) Program provided common area measures for multifamily Deed Restricted Properties. The new ESA MFWB Program combines these elements and incorporates the addition of whole building measures and non-Deed Restricted Properties.
 - Multifamily properties are defined as having 5 or more units with a minimum of 2 attached units.

CPUC DIRECTION (CONT'D)

- **To best meet the needs of customers, this newly designed program will serve all facets of a multifamily property based upon property owner interest and tenant willingness (in the case of in-unit):**
 - In-unit
 - Common Area
 - Whole Building
- **The Commission directed SDG&E to serve as Program Administrator for the 3 Southern Investor-Owned Utilities (IOUs) – SDG&E, SoCalGas and SCE – and PG&E to serve as Program Administrator for PG&E territory.**
- **This Presentation provides an overview of the Southern MFWB Implementation Plan.**

PROGRAM PARTNERS



PROGRAM OBJECTIVES



- Serve eligible Deed Restricted and Non-Deed Restricted low-income, multifamily buildings with in-unit, common area and whole building measures.
- Offer comprehensive energy saving improvements to help provide the whole building with long-term reductions in energy consumption.
- Apply a whole-building approach to evaluate the installation of measures aimed at improving the efficiency of the building envelope, domestic hot water, heating/cooling, lighting, appliances, plug loads and other multifamily end uses.
- Provide customer service excellence in all aspects of program delivery.
- Achieve CPUC established goals for energy savings and property treatments.

PROGRAM GOALS

Program Goals	2023	2024	2025	2026	Total
Electric (kWh)	3,916,471	11,834,944	11,834,944	11,834,944	39,421,303
Gas (Therms)	227,457	723,721	723,721	723,721	2,398,620
Household Treatments (In-Units)	15,594	46,783	46,783	46,783	155,943
Property Treatments	87	260	260	260	867

MFWB ESA CET	2023	2024	2025	2026	Total
	.38	.46	.48	.54	.48

*Program energy savings are calculated based upon deemed measure values established in published work papers.

PROGRAM BUDGET

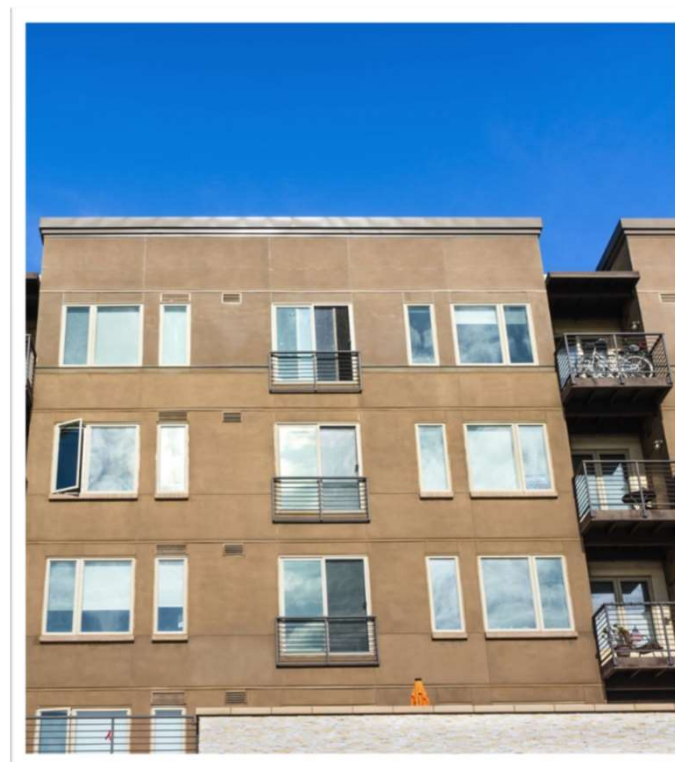
Budget by IOU	2023	2024	2025	2026	Total
SCE	\$5,027,981	\$13,186,899	\$13,508,740	\$12,579,028	\$44,302,647
SoCalGas	\$7,685,788	\$20,157,538	\$20,649,505	\$19,228,344	\$67,721,176
SDG&E	\$3,355,201	\$8,799,695	\$9,014,461	\$8,394,059	\$29,563,415
Total	\$16,068,970	\$42,144,132	\$43,172,706	\$40,201,430	\$141,587,239

PROGRAM SUMMARY

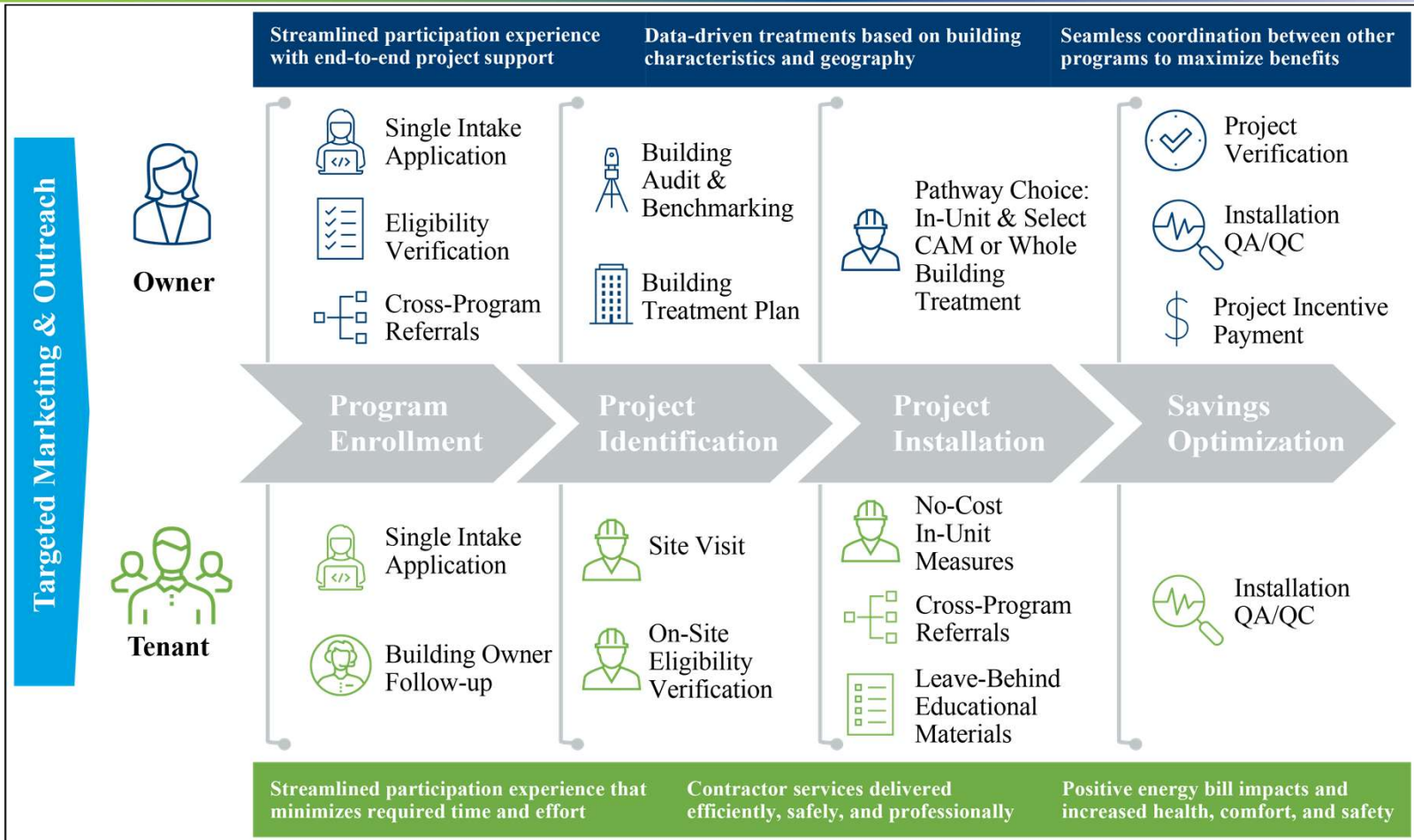
- The Southern MFWB Program will serve ESA-eligible multifamily properties and tenants through a seamless, comprehensive approach.
- The program will offer the possibility of end-to-end treatment of the entire building by developing treatment plans that combine in-unit, common area and whole building measures.
- Both Deed Restricted and Non-Deed Restricted may participate providing they meet the respective qualifications.
- The Program is Administered by SDG&E on behalf of the 3 Southern IOUs with a 3rd party implementer owning responsibility for program execution.

PROGRAM SUMMARY (CONT'D)

- The Program will target eligible participants in Disadvantaged Communities and in designated Customer Segments or Need States in addition to the broader low-income audience.
- The Program includes select electrification measures designed to promote greater energy efficiency, improved air quality and reduced GHG emissions.
- Implementation Plan is uploaded in CEDARs and provides additional details
 - <https://cedars.sound-data.com/programs/list/>



PROCESS OVERVIEW



MEASURE CATEGORIES

- Program Measures fall into these categories for all program pathways:

Measure Type	Examples
Air Sealing & Building Envelope	Caulking, Wall Repair, Attic Insulation
Domestic Hot Water	Water Heaters, LF Showerheads, TSV
Electrification	Conversion of NG to HP technology
Health, Comfort & Safety	Smoke Alarms, CO Detectors, Door Locks
HVAC	Space Heating & Cooling Repair and Replacement
Large Appliance	Refrigerators, Clothes Washers
Lighting	Lighting Fixtures, LED Bulbs
Other EE	VS Pool Pumps, Smart Power Strips

- The Program will work to incorporate healthy building materials where appropriate considering both cost and benefits to program participants.

WORKFORCE DEVELOPMENT

- **In order to support improved job access for disadvantaged workers, the Program will:**
 - Establish formal partnerships with community colleges to support recruiting and training efforts.
 - Leverage the statewide Career & Workforce readiness program to target potential workers.
 - Use local, small and disadvantaged business to support program implementation.
 - Identify training resources for subcontractors to leverage in support of ongoing employee development and career pathways.
 - Attempt to coordinate with other job training programs and organizations providing job-related services.
 - Track employee statistics related to hiring, training, career progression and certifications

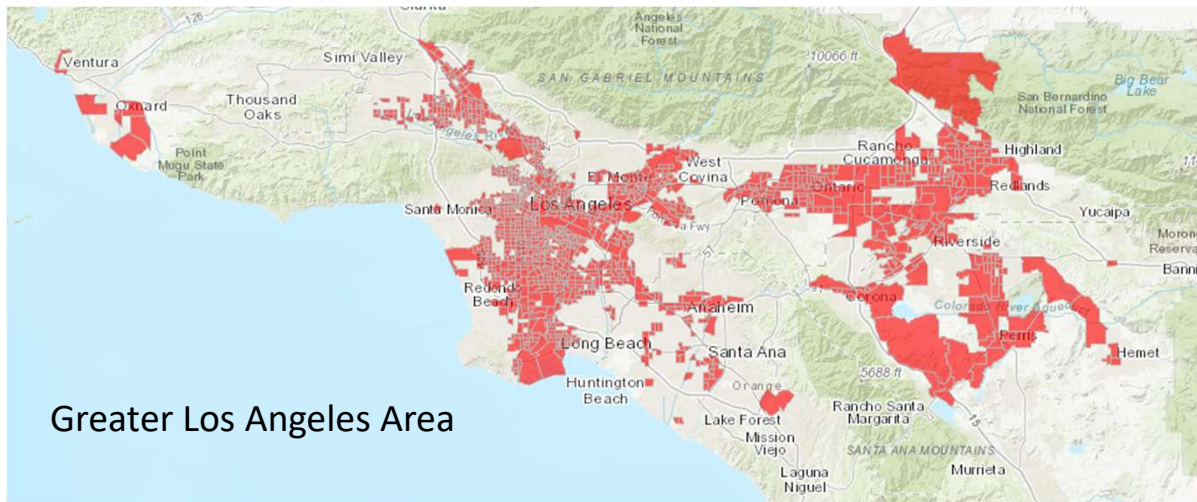




CUSTOMER JOURNEY

DISADVANTAGED COMMUNITIES

- The MFWB Program will target properties and tenants located in a Disadvantaged Community.
- Disadvantaged Community is defined by the California Environmental Protection Agency as those census tracts scoring in the top 25 percentile of census tracts statewide based the 20 different indicators evaluated in the CalEnviroScreen tool.



CUSTOMER SEGMENTS AND NEED STATES

- The Commission directed IOUs to dedicate additional efforts reaching customers in one of the identified Customer Segments or Need States including:



Seniors



Veterans



Hard-to-Reach



Rate Discount Programs
CARE, FERA, Medical Baseline



High Energy Users



Rural



Tribal



**High Fire Threat
Districts (HFTD)**

MARKETING AND OUTREACH



**Identify targets
based upon
customer
segments**



**Develop clear
and informative
marketing
materials and
approach**



**Deliver
targeted
outreach,
learn and
revise
approach**



**Conduct
high-touch
engagement
with owners**



**Evaluate
results and
adapt**

BUILDING ELIGIBILITY – DEED RESTRICTED

- **Deed Restricted Property Definition:** A multifamily residential complex financed with low-income housing tax credits, tax-exempt mortgage revenue bonds, general obligation bonds or local, state or federal loans or grants.
 - Designed to ensure continuation of affordable multifamily housing
 - Carry restrictions on sales price for a minimum time period
 - Include tenant rent protections to prevent significant rent increases
- **To be eligible, Deed Restricted Properties must house:**
 - At least 65% of tenants at or below 250% of FPL
 - If the deed restriction ends within 10 years of receiving MFWB Program Services, at least 50% of building tenants shall be CARE income qualified (at or below 200% FPL) for the remainder of the deed restriction.



BUILDING ELIGIBILITY – NON-DEED RESTRICTED

- **Non-Deed Restricted Property Definition: A multifamily residential complex that has no deed restrictions attached to the land including those which limit rent increases or the sale of the property.**
- **To be eligible, Non-Deed Restricted Properties must house:**
 - At least 80% of tenants at or below 250% of the Federal Poverty Level
 - Property owners must agree to maintain at least 50% of the tenants as CARE-qualified (at or below 200% FPL) for a period of 10 years following receipt of MFWB Measures
- **Non-Deed Restricted Properties pay a 50% co-pay for whole building and common area measures.**

IN-UNIT TENANT ELIGIBILITY



- **Individual units within a multifamily property may qualify on their own, independent of building qualification, based on the Tenant meeting one of the following criteria:**
 - Household income qualifies at or below 250% of the FPL
 - Categorically qualify based upon demonstrated enrollment in a designated income-based program (e.g. CARE, FERA, WIC, etc.)

- **In-unit measures are fully subsidized at no cost for both Deed Restricted and Non-Deed Restricted Properties.**





Other Program Information

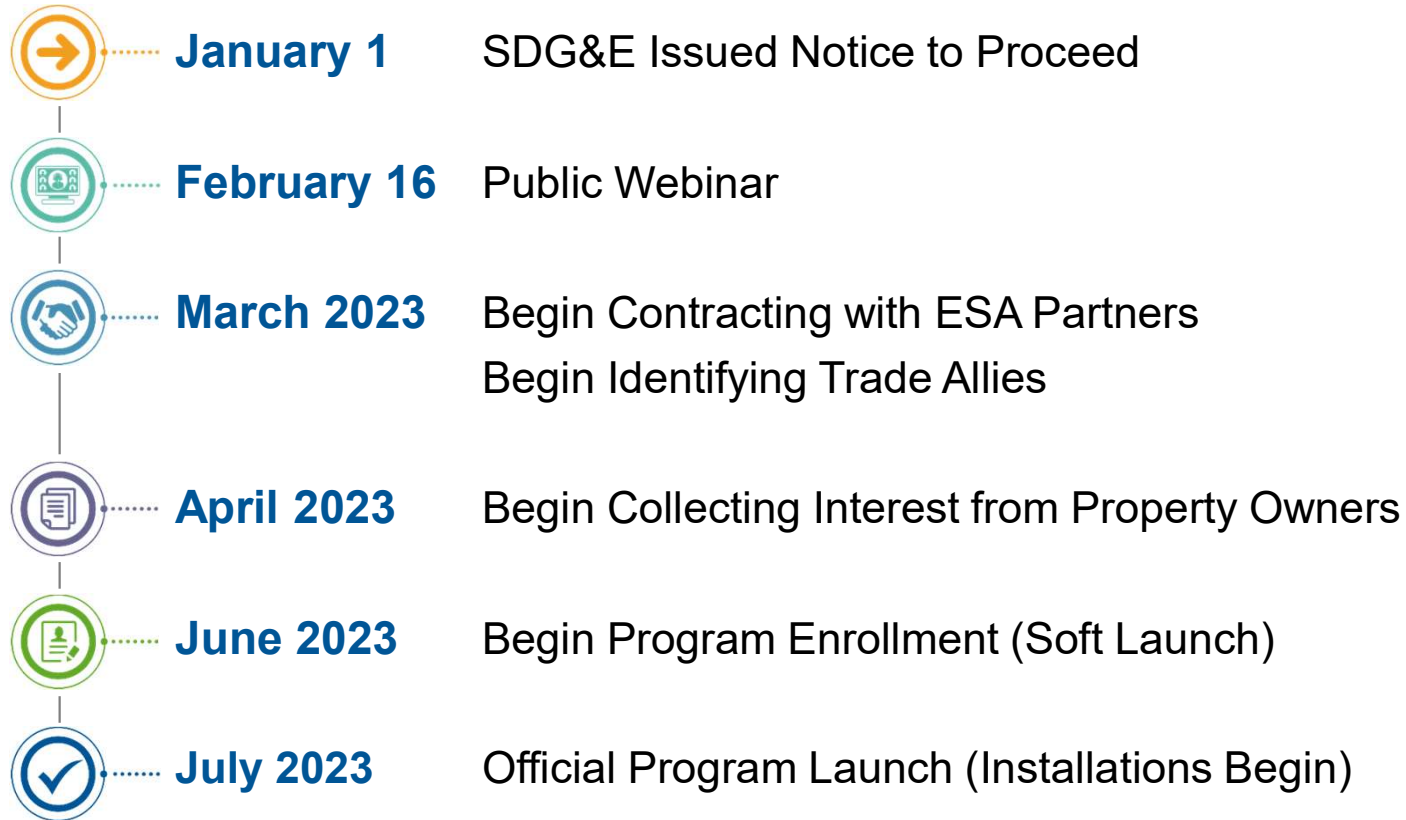
KEY PERFORMANCE METRICS

Program success will be evaluated using the following key performance indicators:

1. Annual kWh Savings
2. Annual Therm Savings
3. Property and In-Unit Treatments Completed
4. Savings Forecast Accuracy
5. Field Inspections Pass Rates
6. # of Customers Enrolled
7. Average Customer Satisfaction Score
8. # of Customer Escalations received quarterly
9. % of Program Savings resulting from DAC customers
10. % of Program Hires qualifying as Local & Disadvantaged Workers



PROGRAM TIMELINE TO LAUNCH



PROGRAM CONTACTS

▪ Program Primary Points of Contact

- ❖ Austin Myatt, RHA Senior Director
 - ALMyatt@rhainc.com
- ❖ Fatima Salcido, RHA Senior Manager
 - FSalcido@rhainc.com
- ❖ Cynthia Rafferty, RHA CEO
 - CBRafferty@rhainc.com

▪ IOU Program Contacts

- Hector Leon, SDG&E, MFWB IOU Program Advisor
 - HLeon@sdge.com
- Valerie Pearce, SCE Program Advisor
 - Valerie.Pearce@sce.com
- John Cullum, SoCalGas Program Advisor
 - JCullum@socalgas.com

ADDITIONAL PROGRAM RESOURCES

- **Additional Information**
 - Program Website URL:
<https://rhacustomerconnect.com/smfwb/>
 - MF Central Portal URL
<https://mcp.customerapplication.com/>
- **Building Owners or Trade Allies who are interested in participation please visit our website to complete an interest form or email southernmfwb@rhainc.com.**



QUESTIONS?

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