



SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

SOMAH Property Owner Series: Energy Efficiency



Agenda

- SOMAH Program Overview
- Current Status and Budget
- Overview of SOMAH application tracks
- Overview of energy efficiency programs
- SOMAH program services
- Q&A

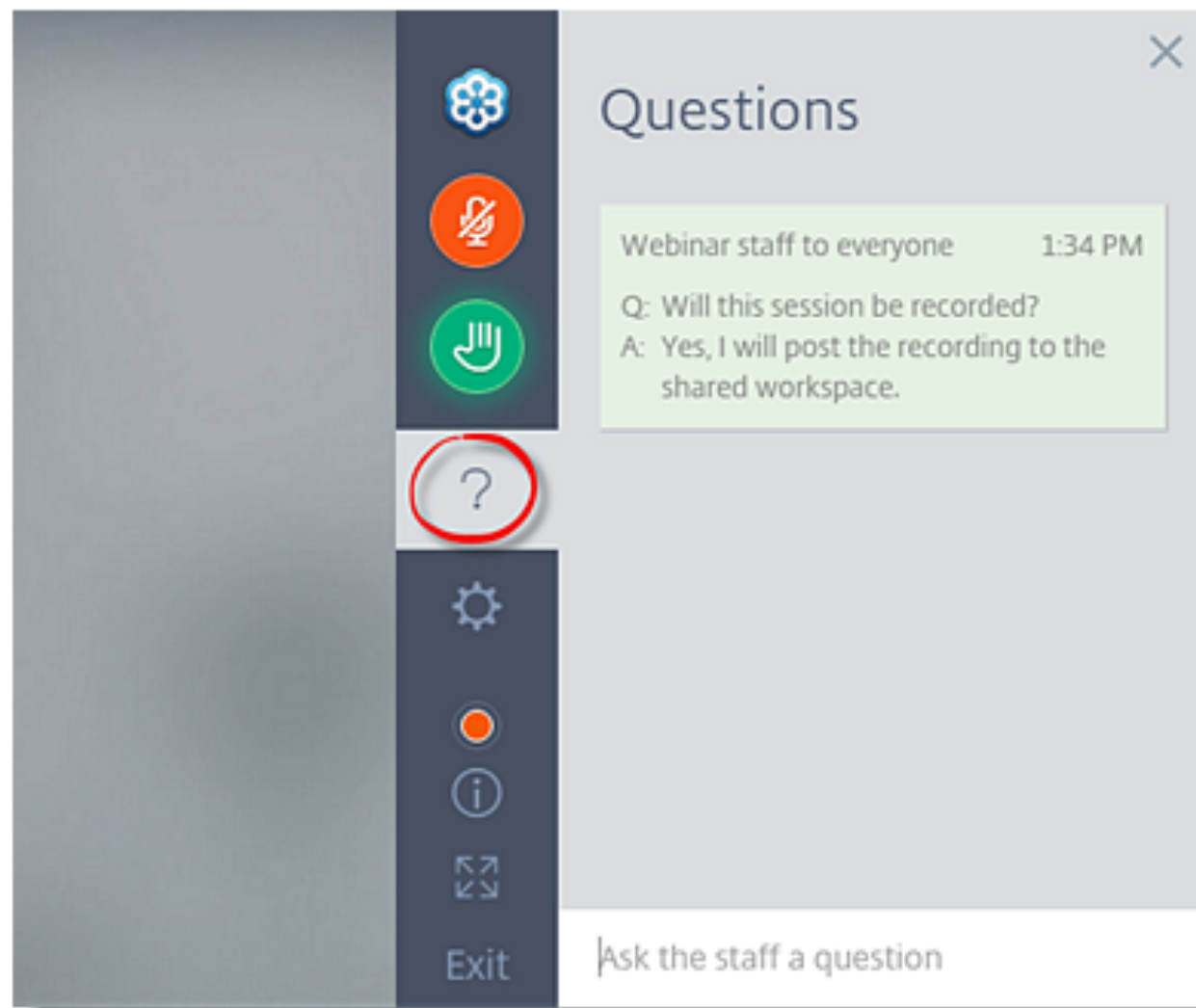
Housekeeping



Here are some things to note about today's webinar:

- Live polls throughout the training
- Q&A portion at the end of presentation

Submitting questions



SOMAH Program Overview



SOMAH Program goals



- Provide clean power and energy cost savings to California multifamily affordable housing residents
- Promote economic development in disadvantaged communities
- Provide maximum direct benefits to tenants
- Develop a larger pool of contractors and a competitive bidding process

Total SOMAH program budget



- Up to \$100 Million annual budget allocated by investor owned utilities (IOUs) from shared greenhouse gas auction proceeds
- The incentive amounts are specifically capped by each IOU territory based on that IOU's auction proceeds
- Projects may only receive incentives from the IOU in which the project is located

Current status and budget



- The program is currently fully subscribed in SDG&E utility territory.
- PG&E, SCE, Liberty and PacifiCorp utility territories still have budget available
- We highly encourage you to continue to submit applications
- Waitlist information available on **CalSOMAH.org/waitlist**

Property eligibility

- At least five units
- Deed-restricted with at least 10 years remaining on the property's affordability restrictions
- Separately metered units
- Existing building or retrofit

Property eligibility (continued)

- Satisfy one of the following
 - 80% of property residents have incomes at or below 60 percent of the area median income (AMI)
 - Property is in a defined disadvantaged community (DAC) that scores in the top 25 percent of census tracts statewide in the [CalEnviroScreen](#) version 3
- Be a utility or community choice aggregator (CCA) customer in the participating utility service territories

SOMAH Program Application Tracks



SOMAH program technical assistance



There are two options to receive Technical Assistance:

- **Upfront Technical Assistance (Track A)** is for property owners who are trying to understand the solar potential for their site, and the associated costs and benefits of moving forward with a SOMAH project.
- **Standard Technical Assistance (Track A & B)** is for property owners and contractors who need assistance with energy efficiency, general project management and construction support.

Upfront technical assistance: Track A



Track A: Upfront Technical Assistance selected



Track B: Upfront Technical Assistance **NOT** selected





Energy Efficiency Programs



Why Talk about Energy Efficiency Programs?



Types of Energy Efficiency Programs

- **Direct Install Programs**
- **Whole Building Rebated EE Upgrades**
- **Electrification Programs**
- **Demand Response, Resiliency, & Load Shift Programs**

Types of Energy Efficiency Programs

- **Direct Install Programs**
 - No-cost install of energy efficiency items
- Whole Building Rebated EE Upgrades
- Electrification Programs
- Demand Response, Resiliency, & Load Shift Programs

Direct Install Programs

- Materials and Installation services provided at no cost
 - No upfront costs for property owners or residents to enroll
 - Fixtures/equipment selected by program, typically
 - Specific measures depending on program
 - Utilities may have various DI programs for different measures
 - Can often enroll in multiple programs as needed
 - Contractors provided by program, typically

Direct Install Programs

- **Investor Owned Utility (IOU) Specific Programs**
 - Energy Savings Assistance Program (ESA In-Unit)
 - Energy Savings Assistance Program Common Area Measures (ESA CAM)
- **Regional Programs**
 - Various

Direct Install Programs

- **ESA In-Unit**
 - No-cost weatherization services to low-income residents
 - Measures include:
 - Attic insulation, energy efficient appliances (like refrigerators, furnaces), low-flow devices, building envelope repairs
 - Implemented separately through each Investor Owned Utility (IOU):
 - Southern California Edison (SCE), Pacific Gas & Electric (PG&E), San Diego Gas & Electric (SDG&E), Southern California Gas (SoCalGas)

Direct Install Programs

- **ESA CAM**

- To qualify, the property must be deed restricted and must certify that at least 65% of the tenant households meet the ESA income guidelines
- Energy efficiency services provided differ by utility and are limited to the common areas
- ESA CAM can be combined with ESA In-Unit
- ESA CAM providers:
 - PG&E, SCE, SDG&E, SoCalGas

Direct Install Programs

IOU Territory	Contact
San Diego Gas & Electric (SDG&E)	Email: multifamily@sdge.com ; Call: 1-800-311-7343
Pacific Gas & Electric (PG&E)	Email: multifamily@trcsolutions.com ; Call: 1-800-933-9555
Southern California Edison (SCE)	Email: multifamily@sce.com ; Call: 1-800-736-4777
Southern California Gas (SoCalGas)	Call: 1-800-331-7593

Types of Energy Efficiency Programs

- Direct Install Programs
- **Whole Building Rebated EE Upgrades**
 - Comprehensive whole-building approach where rebates can cover a significant portion of upgrade costs
- Electrification Programs
- Demand Response, Resiliency, & Load Shift Programs

Whole Building Programs

- Often provide free audit and/or technical assistance
 - Single Point of Contact
- More comprehensive energy savings
 - Minimum energy savings to enroll, typically
 - Assess whole building energy usage
 - More measures often eligible than DI, typically
- Flexibility and Choices
 - Fixtures, finishes, contractors
- Rebates: only partial cost coverage
 - Paid at end of project, typically
 - Need upfront capital

Whole Building Rebated EE Upgrade Programs

- **Statewide**
 - Low-Income Weatherization Program for Multifamily (LIWP-MF)
 - IOU Whole Building Programs (in development, 2021)
- **Regional**
 - Regional Energy Networks
 - BayREN
 - SoCalREN
 - 3C-REN
 - Programs offered by CCAs

Whole Building Rebated EE Upgrade Programs



- **Low-Income Weatherization Program for Multifamily (LIWP-MF)**
 - Whole building energy efficiency, solar thermal, and solar PV for multifamily properties under a single program
 - Energy efficiency incentives (including solar thermal) are based on amount of GHG reductions, includes electrification
 - Free technical assistance

Whole Building Rebated EE Upgrade Programs

- **LIWP-MF Eligibility**

- Properties with 5 units or more
- Located in a CalEPA Disadvantaged Community (DAC)
- At least 66% of tenants with incomes <80% AMI
- Able to achieve minimum modeled energy savings >15%
- Incentives cannot exceed net project cost

Whole Building Rebated EE Upgrade Programs



Measure Category	Measure Type	
Building Shell	Cool roof Roof insulation Attic insulation Wall insulation Floor insulation	Window/sliding door replacement Window coatings Window shading Air sealing
Heating and Cooling	Heating system replacement Cooling system replacement Fan replacement Pump replacement	Duct insulation HVAC system controls Energy Management Systems
Water Heating	Water heater/boiler replacement Variable speed pumps Recirculation controls	Pool, spa pumps and equipment Low flow fixtures (kitchen/bath) Pipe insulation
Lighting and Appliances	Indoor, outdoor, parking lot, and garage	Refrigerators, Dishwashers, washer & dryers
Renewable Energy	Solar hot water systems (thermal)	Solar photovoltaic

Whole Building Rebated EE Upgrade Programs



Get started!

- To submit an interest form online: camultifamilyenergyefficiency.org
- To learn more about LIWP-MF, contact Michael Claproth at mclaproth@chpc.net

Whole Building Rebated EE Upgrade Programs



- **Regional Energy Networks**

- **BayREN**

- Whole-building rebates at \$750 per dwelling unit
 - Located in 9-county Bay Area



- **SoCalREN**

- Incentives vary and can be up to \$1,200 per unit
 - Southern California Edison (SCE) or SoCalGas served properties



- **3C-REN** (late 2020)

- Properties in San Luis Obispo, Santa Barbara, and Ventura Counties

Whole Building Rebated EE Upgrade Programs



- **Regional Energy Networks**

- Enroll Online:

- **BayREN:** bayareamultifamily.org/interest-form
 - (855) 213-2838
 - **SoCalREN:** socalren.com/multifamily/interest-form
 - (877) 785-2237
 - **3C-REN:** <https://www.3c-ren.org/>
 - (805) 220-9991



Types of Energy Efficiency Programs

- Direct Install Programs
- Whole Building Rebated EE Upgrades
- **Electrification Programs**
 - DI or Whole Building Programs focused on eliminating natural gas use
- Demand Response, Resiliency, & Load Shift Programs

Electrification Programs

- **Improve indoor air quality by eliminating combustion appliances**
- **Good pairing with Solar PV Installation**
 - Engage with programs early in the design process to understand load additions
 - Good consideration for properties with large roof space who want to maximize their onsite solar energy generation while reducing energy bills

Electrification Programs

- **Statewide**

- TECH (midstream program, future)
- BUILD (new construction, all electric program, future)
- Low-Income Weatherization Program for Multifamily (LIWP-MF)
- SGIP (future HPWH program)

- **Regional**

- Regional Energy Network offerings (BayREN MF & Midstream HPWH Program)
- Municipal Utility Programs
- CCA Programs (ex: Marin Clean Energy Low-Income Families and Tenants (MCE LIFT))
- South Coast AQMD Multifamily Affordable Housing Electrification Program (Summer 2020)

Electrification Programs

- **South Coast AQMD Multifamily Affordable Housing Electrification Program**
 - Incentivizes all fuel-switching measures that eliminate NOx emissions
 - Eligibility:
 - Affordable housing
 - Properties in DACs given priority (CalEnviroScreen 3.0)
 - 60% of funds must be spent on properties within 6 miles of a refinery and 7% of funds must be spent within 6 miles of a peaker power plant
 - Program to launch mid-summer 2020
 - <http://www.aqmd.gov/home/programs>

Types of Energy Efficiency Programs

- Direct Install Programs
- Whole Building Rebated EE Upgrades
- Electrification Programs
- **Demand Response, Resiliency, & Load Shift Programs**

Demand Response, Resiliency, & Load Shift Programs

- **Statewide Programs**
 - Self-Generation Incentive Program (SGIP) - Batteries
- **Regional**
 - CCA Programs
 - IOU Programs: PG&E WatterSaver (HPWH load shift)

Demand Response, Resiliency, & Load Shift Programs

- **Self-Generation Incentive Program (SGIP)**
 - Rebates for installing energy storage technology, including battery storage systems
 - General Budget - \$830 M
 - No income eligibility requirements & \$0.5 per kWh
 - Equity Budget - \$83 M (fully subscribed, except for SCG)
 - Low-income rent restriction at least 80% of units at or below 60% AMI or located in DAC
 - SOMAH enrollment automatically qualifies you for SGIP
 - \$ 0.85 per kWh

Demand Response, Resiliency, & Load Shift Programs

- **Self-Generation Incentive Program (SGIP)**
 - Equity Resiliency Budget - \$169 M, SCE and \$48 M, SCG
 - Are located in a Tier 3 or Tier 2 HFTD or were subject to two or more discrete PSPS events prior to the date of application for SGIP incentives
 - \$ 1 per kWh
 - Heat Pump Water Heater Budget- \$45 M
 - For heat pump water heating

Demand Response, Resiliency, & Load Shift Programs

IOU Territory + Website	Contact
<u>San Diego Gas & Electric</u> (SDG&E)	Email: SGIP@energycenter.org
<u>Pacific Gas & Electric</u> (PG&E)	Email: selfgen@pge.com
<u>Southern California Edison</u> (SCE)	Email: SGIPgroup@sce.com
<u>Southern California Gas</u> (SoCalGas)	Email: selfgeneration@socalgas.com

Other Program Resources

Affordable Multifamily Energy Efficiency Financing Program



- **Pilot overview –**

- Bring private capital to finance EE retrofits in existing buildings
- Available to deed restricted multifamily properties with income limits that might not have funds for deeper EE retrofits
- Organizations behind the AMF program:
 - California Public Utility Commission (CPUC)
 - California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)
 - Investor Owned Utilities (IOUs)

- **Current Financing Option* –**

- Energy service agreements
 - \$250,000-\$10,000,000
 - 100% project financing
 - Terms up to 10 years
 - Ability to treat as an off-balance sheet transaction
 - Includes maintenance

* In active discussions with lenders on a lease product that could finance less than \$250,000

Affordable Multifamily Energy Efficiency Financing Program - Eligibility



- **Property:**
 - Affordable multifamily residential property with 5 or more units
 - IOU or CCA customer
 - At least 5 years remaining on recorded affordability deed restriction covenant
 - At least 50% of units reserved for households meeting HCD moderate or below income requirements
- **Financing Customer:**
 - No outstanding judgements, liens or bankruptcy filings within the last 5 years
 - Owner does not reside at the property
- **Pathways to qualifying EE measures –**
 - Any EE or demand response measure approved for rebate and incentive by:
 - Any IOU (SCG, SCE, SDG&E, PG&E)
 - Any CA Renewable Energy Network (REN) or Community Choice Aggregator (CCA)
 - LIWP program
 - SOMAH program

Affordable Multifamily Energy Efficiency Financing Program



- **Resources:**

- Visit: www.greenfinancing.com/multifamily
- Contact: Susan Mills at susan.mills@treasurer.ca.gov

More Resources and How to Get Started

- Contact your utility service providers
- Database of State Incentives for Renewables and Efficiency (DSIRE)
 - [DSIREusa.org](https://www.dsireusa.org)
- Contact SOMAH for free Technical Assistance

Questions to ask

- What measures/programs are available for affordable multifamily buildings?
- What are the eligibility requirements?
- Is there a minimum energy savings required to participate?
- What (if any) upfront out-of-pocket costs will I need to provide?
- Can I choose my own contractor or equipment?
- Do you provide technical assistance before, during, or after installation?

Technical Assistance for Projects

- Whether applying under Track A or B, SOMAH's no-cost technical services can help along the way
- Technical assistance services include:
 - Solar feasibility
 - Navigating the contractor bidding portal
 - Education and resources for financial options
 - **Referrals to relevant energy efficiency programs – let us help you make the connection**

Technical Assistance for Projects

SOMAH Energy Project Managers can help

- Understand and navigate the SOMAH EE Compliance requirements
- Identify eligible, appropriate programs in your region
- Help participants understand how to enroll for programs and make referrals
- Identify opportunities for stacking, combining free or low-cost program offerings

Technical Assistance for Projects



To get started with free SOMAH Technical Assistance, visit us at

<https://calsomah.org/technical-assistance>

Thank You

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