

## Investor Owned Utility Programs Available for the Multifamily (MF) Sector

Type	Program	Target Audience	Offering	Eligibility	Application Requirements	Target # Units (2010-2012)	Program Budget (2010-2012)	Program Websites
<b>STATEWIDE RESIDENTIAL</b>	<b>Low Income Energy Efficiency (LIEE) Program</b>	Low income households <sup>1</sup>	No-cost energy efficiency and appliance repair and replacement measures. Most measures available to single family are available to MF units as long as occupants are income qualified and building owner/property manager has consented to the work.	Tenants are eligible with approval of property owner or manager. In program year 2009 MF dwellings accounted for 27% of total LIEE project work. Entire complexes can also be verified based on the 80–20 rule.	Income must be verified by service provider and each participant must sign an application. Utility verified CARE recipients are automatically eligible though still require independent income verification.	Total: 747,054  PG&E: 249,982 SCE: 166,890 SCG: 289,414 SDG&E: 40,768	PY2010: \$310,685,254  PY2011: \$318,786,772  (LIEE program budget cycle is from 2009-2011; only figures for applicable years are listed.)	<a href="http://www.socalgas.com/residential/assistance">www.socalgas.com/residential/assistance</a>  <a href="http://www.sdge.com/residential/assistance/energyTeam.shtml">www.sdge.com/residential/assistance/energyTeam.shtml</a>  <a href="http://www.pge.com/energypartners">www.pge.com/energypartners</a>  <a href="http://www.sce.com/residential/income-qualified/ema/energy-management-assistance.htm">www.sce.com/residential/income-qualified/ema/energy-management-assistance.htm</a>
	<b>California Advanced Home Program (CAHP)</b>	Developers/builders for new construction and significant remodel	Performance based incentives starting at \$0.18/kWh, \$0.73/therm, and \$27.63/kW at 15% > Title 24, with incentive caps at 45% > Title 24. \$100 unit base incentive. PV kicker; additional incentives for compact and green certified homes. Design and technical assistance provided.	New MF construction and performance-based "gut and remodel" of existing MF structures. New construction, affordable, and market-rate MF complexes of three dwelling units or more.	Projects can apply any time between 1/1/2010 and 12/15/2012, prior to project completion (defined as prior to drywall installation). Applying early in design phase is highly recommended. Project applications should be submitted six months prior to any financing applications. Recommended project documents for submittal include a letter of intent, building plans, lot plan, application form, Title 24 checklist and other Title 24 documentation, and other energy efficiency documentation.	No specific unit goal for the multifamily segment.	\$51,383,787 total  PG&E: \$13,521,688; SCE: \$24,894,000; SDG&E: \$4,398,013; SCG: \$8,570,086	<a href="http://www.pge.com/newhomes">www.pge.com/newhomes</a>  <a href="http://www.CaliforniaAdvancedHomes.com">www.CaliforniaAdvancedHomes.com</a>  <a href="http://www.sce.com/builder">www.sce.com/builder</a>  <a href="http://www.sdge.com/builderservices/newHomes.shtml">www.sdge.com/builderservices/newHomes.shtml</a>

<sup>1</sup> Household income less than 200% of federal poverty level. Multifamily is defined as 5 or more units.

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STATEWIDE RESIDENTIAL	Energy Upgrade California	MF complex owners/managers of existing buildings	<b>Single family:</b> performance incentives up to \$4,000 for installation of measures reducing energy use by 20%; prescriptive incentives up to \$1,000 for installation of basic package of measures. <sup>2</sup> <b>MF incentive packages currently under development.</b>	Existing buildings, major energy efficiency upgrades.	Application available on Energy Upgrade California website.	No specific target for MF	Currently only available for single family dwellings; incentives aimed at MF market expected in 2011.	<a href="http://www.sdge.com/energyupgrade">www.sdge.com/energyupgrade</a> <a href="http://www.sce.com/residential/rebates-savings">www.sce.com/residential/rebates-savings</a> <a href="http://www.socalgas.com/rebates/residential">www.socalgas.com/rebates/residential</a> PG&E website to be determined.
	Multifamily Energy Efficiency Rebate Program	MF complex owners/managers of existing buildings	Prescribed rebates on a range of energy efficiency lighting, appliances, and building envelope for dwelling and common areas. Non-incentive offerings include education on the value of energy efficiency and cross-marketing with LIEE offerings.	Existing buildings, minor energy efficiency upgrades. Affordable and market rate complexes of 2 dwelling units or more. Tenants eligible to receive services with landlord approval.	Funds available until depleted, held on a first come, first serve reservation basis. Supporting documents must be submitted within 45 calendar days of reservation. Documents include Multifamily Reservation Form, Rebate Application, Invoice / Proof of Purchase. SDG&E documents also include Product Location Forms for common area and apartments.	PG&E: 15,000 direct mailers/year. SDG&E, SCE: 20,000 mailers/year. SCG: No stated targets. <sup>3</sup>	\$80,188,539 total PG&E: \$20,856,887; SCE: \$45,732,227; SDG&E: \$5,131,751; SCG: \$8,467,674	<a href="http://www.pge.com/multifamily">www.pge.com/multifamily</a> <a href="http://www.sdge.com/residential/multiFamilyRebate.shtml">www.sdge.com/residential/multiFamilyRebate.shtml</a> <a href="http://www.sce.com/residential/rebates-savings/multifamily/multifamily-energy-efficiency.htm">www.sce.com/residential/rebates-savings/multifamily/multifamily-energy-efficiency.htm</a> <a href="http://www.socalgas.com/rebates/multifamily">www.socalgas.com/rebates/multifamily</a>

<sup>2</sup> Blower-door-based air sealing, attic insulation, pipe wrap for all accessible domestic hot water heater piping, duct sealing, and an optional measure—low flow showerhead or thermostatic control valve for showerheads.

<sup>3</sup> IOU's have also established non-program delivery targets such as ensuring properly licensed contractors and direct outreach to large property managers (3 per year for PG&E, SDG&E, SCE).

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STATEWIDE RESIDENTIAL	Appliance Recycling Program (Not SCG)	Res. and comm. building occupants, either existing occupants or at the time of transfer	Free pick-up and recycling of eligible, functioning appliances along with a monetary incentive.	Refrigerators, freezers, and room AC units (excluding SCE) available for pick up from residential and commercial locations.	Participants phone-in or schedule a pick up via website.	15,722 recycled appliances per year. There is no specific MF target.	\$67,784,646 total PG&E: \$20,241,876; SCE: \$39,342,770; SDG&E: \$8,200,000	<a href="http://www.appliancerecycling.com/weborder/rebatex.aspx?ProgramID=1">www.appliancerecycling.com/weborder/rebatex.aspx?ProgramID=1</a>  <a href="http://www.sce.com/residential/rebates-savings/appliance/fridge-freezer-recycling.htm">www.sce.com/residential/rebates-savings/appliance/fridge-freezer-recycling.htm</a>  <a href="http://www.sdge.com/residential/rebates.shtml">www.sdge.com/residential/rebates.shtml</a>
	Home Energy Efficiency Survey	Residential households	HEES provides opportunities for residents to assess the energy impact of their dwelling spaces, appliances and plug load devices.	Residential single family and multifamily units.	Customer may take the survey on line or via mail.	<b>PG&amp;E:</b> 42,000 on line, 7,245 mail in, 4,000 in home, and 105 phone surveys. <b>SCE:</b> 21,875 on line, 13,125 mail in, 7,875 in home, and 875 phone surveys. <b>SDG&amp;E:</b> 2,500 on line, 800 mail in surveys. <b>SCG:</b> 5,000 on line, 5,000 mail in, and 5,500 in home surveys.	\$32,396,994 total PG&E: \$21,018,892; SCE: \$6,950,911; SDG&E: \$2,049,080; SCG: \$2,378,112	<a href="http://www.socalgas.com/residential/energysurvey/index.html">www.socalgas.com/residential/energysurvey/index.html</a>  No website info has been supplied by PG&E, SCE, or SDG&E for this program.

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STATEWIDE COMMERCIAL	Commercial Calculated Incentives	Buildings on a commercial rate, including portions of buildings	Calculated and tailored incentives for non-residential retrofits. Non-incentive offerings include technical assistance for application preparation.	Common areas of multifamily complexes.	Standard application form available online. Pre and post project inspections.	All commercial rated customers - no specific target for multifamily.	\$149,047,635 total PG&E: \$84,820,223; SCE: \$52,007,662; SDG&E: \$4,248,850; SCG: \$7,970,900	<a href="http://www.sce.com/customized_solutions/www.sdge.com/business/esc">www.sce.com/customized_solutions/www.sdge.com/business/esc</a>  <a href="http://www.pge.com/mybusiness/energysavingsrebates">www.pge.com/mybusiness/energysavingsrebates</a>  No website info has been supplied by SCG for this program.
	Non-Residential Audits	Non-residential; MF property owners/managers.	Three audit levels: basic audits, integrated audits, and retrocommissioning (RCx) audits. Basic and online integrated audits target users below 200 kW; RCx audits are intended for larger users. Each audit generates a final audit report with recommendations for improvements. Program offers technical assistance to increase conversion rates.	All non-residential commercial establishments. Specific audits geared towards different customer types.	Online energy audits available for specific business types (including apartment complexes). To request a more in-depth audit, customers are routed to the business customer service center.	Only commercial rated customers.	\$34,192,073 total PG&E: \$20,237,598; SCE: \$10,559,031; SDG&E: \$1,562,143; SCG: \$1,833,301	<a href="http://www.pge.com/mybusiness/energysavingsrebates/analyzer/index.shtml">www.pge.com/mybusiness/energysavingsrebates/analyzer/index.shtml</a>  <a href="http://www.sce.com/business/ems">www.sce.com/business/ems</a>  <a href="http://www.sdge.com/business/rebatesincentives/programs/allPrograms.shtml">www.sdge.com/business/rebatesincentives/programs/allPrograms.shtml</a>  <a href="http://www.socalgas.com/rebates">www.socalgas.com/rebates</a>
	On-Bill Financing	Commercial, Industrial, Institutional	Full upfront cost covered for eligible measures and customers with good credit, as determined by IOU. Estimated energy savings must be greater than debt servicing. Financing provided at 0% interest over 5 years, <sup>4</sup> \$5,000 to \$100,000 loans tied to meter.	Active accounts in good credit standing with at least two years bill payment history. Multifamily common area locations (owner not living on premises). <b>Financing does not qualify for residential applications.</b> Measures must qualify for a rebate or incentive through IOU program.	Standard application form available online. IOU inspects project prior to commencement and verifies calculated energy savings. Must submit energy saving workbook indicating existing and proposed equipment, operating hours, and technical specifications.	All commercial and industrial customers.	\$143,554,308 total PG&E: \$18,500,000 SCE: \$15,000,000 SDG&E: \$5,000,000 SCG: \$3,500,000	<a href="http://www.sdge.com/obf">www.sdge.com/obf</a>  No website info has been supplied by SCG, PG&E, or SCE for this program.

<sup>4</sup> Loan terms can be lengthened to match expected life of measure.

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<b>STATEWIDE COMMERCIAL</b>	<b>Commercial Deemed Incentives</b>	Non-residential; multifamily property owners/managers	Provides rebates to non-residential customers for installing energy efficient lighting, refrigeration, food service, natural gas (PG&E and SDG&E only) and other technologies.	All nonresidential commercial establishments. Portions of multifamily complexes / facilities on a commercial rate (i.e., corridors, atriums, etc.)	Standard application form available online.	All commercial customers.	\$143,554,308 total PG&E: \$58,516,685; SCE: \$53,263,233; SDG&E: \$16,520,919; SCG: \$15,253,471	<a href="http://www.pge.com/businessrebates">www.pge.com/businessrebates</a> <a href="http://www.pge.com/tradepro">www.pge.com/tradepro</a> <a href="http://www.sce.com/Express_Solutions">www.sce.com/Express_Solutions</a> <a href="http://www.sdge.com/businessrebates">www.sdge.com/businessrebates</a> <a href="http://www.socalgas.com/energyefficiency">www.socalgas.com/energyefficiency</a>
	<b>QI/QM Duct Test and Seal, Refrigerant Charge and Airflow</b>	Residential and commercial building occupants	Service providers promote program through participating HVAC contractors who receive incentives to perform quality installation and quality maintenance service on new and existing HVAC systems.	Customer must have an active residential single family or small commercial electric account. Installation must take place at a PG&E service address, and must be located in Climate Zones 2, 4, 11, 12, or 13 for DTS. No climate zone requirement for RCA.	Contractor is paid an incentive for performing work for customer. Contractors enter into agreements with Verified Service Providers who administer program and quality assurance checks.	N/A	Residential QI: PG&E: \$13,711,409 SCE: \$3,080,674 SDG&E: \$83,481 SCG: \$87,168 Comm. QI: PG&E: \$7,383,067 SCE: \$2,499,972 SDG&E: \$61,695 SCG: \$55,996 Res / Com QM: PG&E: \$9,378,683 SCE: \$28,486,042 SDG&E: \$97,751 SCG: \$203,209	<a href="http://www.pge.com/myhome/saveenergymoney/rebates/coolheat/duct/">www.pge.com/myhome/saveenergymoney/rebates/coolheat/duct/</a>  No website info has been supplied by SoCal Gas, SCE, or SDG&E for this program.

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PARTNERSHIP PROGRAMS	Palm Desert Demonstration Pilot	Commercial and residential customers in the City of Palm Desert.	Big Bold Energy Efficiency Strategies and innovative approaches to encourage energy efficiency. Effective behavioral messaging pilot, Set-To-Save marketing campaign and pilot projects. One-Stop-Shop for Palm Desert residents, On-Bill Financing for public agencies and businesses. Support to City's AB811 Energy Independence Program (EIP).	Commercial and residential customers in the City of Palm Desert.	Palm Desert Applications on Set-To-Save website.	457,072 gross Therm (2010-12 goal) <sup>5</sup>	\$649,300 (Approved budget through 12/31/2010)	<a href="http://www.settosave.com">www.settosave.com</a>
	San Francisco Energy Watch MF Plus Program (PG&E)	MF property owners and managers	Free energy audit and incentives for efficiency measures for lighting, HVAC and building envelope. MF Plus serves both dwelling units and common space.	Deemed and calculated incentives are provided to participating contractors for the installation of qualified energy efficiency products in existing MF complexes with 2 or more dwelling units.	Participating contractor must submit Incentive Application Form and signed Site Access Agreement prior to installation. Following completion of project, participating contractor submits an Installation Verification Form and supporting documentation.	N/A	Approx. \$3,000,000 for PY2010-2012	<a href="http://www.sfenergywatch.org/multifamily.html">www.sfenergywatch.org/multifamily.html</a>

<sup>5</sup> Local Government Partnership Programs are non-resource programs that coordinate and support all Core Program offerings including Residential Multi-family by leveraging the authority, unique local expertise and roles of local governments in the communities they serve. Through its effort in energy efficiency education, training, reach codes and community outreach, the M&O component of each LGP Program is designed to increase energy efficiency practices and stimulate greater participation in all Core Programs including those for Multi-family.

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	Moderate Income Direct Install (MIDI) Program**	Moderate income customers.	Free energy assessment and free installation of efficiency measures, such as comprehensive lighting, attic insulation, pipe wrap, hot water heater blankets, and low flow showerheads and faucet aerators. MIDI serves both multifamily dwelling units and common space.	MIDI targets customers at 200% - 400% above federal poverty level. Tenants eligible with approval of property owner/mgr. Also serves common spaces in low income buildings (LIEE does not serve common spaces). Consistent with LIEE, MF dwellings are defined as those in buildings with five or more dwelling units. Also serves single family.	MIDI serves multifamily customers who are approached by LIEE but determined to be ineligible for LIEE during the income verification process.	N/A	\$4,352,000 for PY2010-2011	TBD
<b>THIRD-PARTY PROGRAMS</b>	Multifamily Solar Pool Heating Program (SCG)	MF complex owners/managers of existing buildings	Aims to encourage large apartment building owners and property mgrs. to install solar water heating systems for swimming pools. Requires installation of solar collectors, booster pumps, solar system controller, and additional material and appurtenances (including, but are not limited to hot water CPVC piping, valves, fittings, drains, air separators, sensors, and insulation and collector structural support).	Apartment complexes with minimum of 40 occupied residential units with pools that are heated throughout the year.	Customers qualify to receive products and services through completion of a Customer Enrollment Form and Installation Agreement: contractor shall provide for review and approval a copy of Installation Agreement Form that program will use to document execution of those services selected by the customer.	Goals for 2010-11 are 105 installations/projects	\$1,497,491	<a href="http://www.energxsolar.com">www.energxsolar.com</a>

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	Multifamily Direct Therm Savings (MFDTs) and Multifamily Home Tune-Up Program (MFHTUP) (SCG)	MF property owners and tenants	Offers no-cost direct installation of water heating devices (low-flow showerheads, bathroom aerators, kitchen aerators, and common area pipe wrap) and provides valuable efficiency education to both multifamily property owners and tenants.	<b>MFDTs:</b> Existing buildings within the following SCG service counties: Los Angeles, Ventura, Kern, San Luis Obispo, and Santa Barbara. <b>MFHTUP:</b> Existing buildings within the following SCG service counties: Orange, San Bernardino, Riverside, and Imperial.	Customers who have qualified to receive energy efficiency devices and services complete a Customer Enrollment Form. The Customer Enrollment Form records program participation and contains relevant customer information.	Target # of installations or projects: <b>2010 -</b> MFDTs: 1,200 MFHTU: 21,067. <b>2011-</b> <b>MFDTs:</b> 600 <b>MFHTUP:</b> 44,123.	MFDTs: \$3,044,872  MFHTUP: \$1,895,109	MFDTs: <a href="https://buildingsolutions.honeywell.com/Cultures/en-US/Markets/Utilities/">https://buildingsolutions.honeywell.com/Cultures/en-US/Markets/Utilities/</a>  MFHTUP: <a href="http://www.ecosconsulting.com/solutions/utility">www.ecosconsulting.com/solutions/utility</a>
	On Demand Efficiency (SCG)	Residential; MF building owners or management	Program sells and installs demand control recirculation pumps to qualified customers.	MF residence apartment complexes with central boilers and a timeclock or no control.	Potential participant is contacted via phone and screened for applicability; participant is sent program collateral and directed to program website for more info; participant submits a rebate application.	810	\$2,575,400	<a href="http://www.oderebateprogram.com">www.oderebateprogram.com</a>
<b>THIRD-PARTY PROGRAMS</b>	<b>Hot Water Control (SDG&amp;E)</b>	Non-residential; MF property owners/managers	Program implements domestic hot water (DHW) control systems in hotels, motels, resort condominiums, and senior care facilities plus other associated hot water end uses (e.g., on-site kitchen and laundry facilities).	DHW control systems in hotels, motels, resorts and senior care facilities plus other associated hot water end uses (e.g., on-site kitchen and laundry facilities).	Customers will participate in a web-based interactive presentation which uses as an example technology on similar facilities to those installed (size and plumbing configuration).	# of installed lodging rooms: 55,000  # of installed kitchen/laundries: 360	\$2,985,110	<a href="http://www.savegas.com/Pages/Public/Programs.aspx">www.savegas.com/PagesPublic/Programs.aspx</a>

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	California Multifamily New Homes (PG&E)	Developers/builders for new construction and significant remodel	Performance based incentives starting at \$0.18 / kWh, \$0.73 / therm, and \$27.63 / kW at 15% > Title 24. Incentives plateau at 45% > Title 24. \$100 / unit base incentive. Additional incentives for energy consultants at \$50/unit and third party verification at \$60/unit that cap at 200 units.	New MF construction and performance based "gut and remodel" of existing MF structures. New construction, affordable and market rate MF complexes of three dwelling units or more.	Though projects can apply at any time prior to completion between 1/1/2010 through 12/15/2012, applying early in the design phase is highly recommended to ensure acceptance of proposal. Application package includes signed application, W9 form, building plans, Title 24 documentation, and service territory verification	N/A	\$4,408,293	<a href="http://multifamily.h-m-g.com/">http://multifamily.h-m-g.com/</a>