



Bringing Multifamily Buildings to the Efficiency Dance

2017 IEPEC Conference — Baltimore, Maryland

August 8, 2017

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Multifamily efficiency is a tough nut worth cracking



Untapped potential

- 24% of US housing units
- ACEEE cites 30% savings potential

Complicated

- Many subsectors
- Split incentives
- Various other barriers ...

Considering the perspective from the inside



California research

- Formative process evaluation
- SoCal utility programs (SCE, SoCalGas, SDG&E)

Market actor perspectives

- Large portfolio decision-makers (n=10)
- Recent participants (n=195)



Goal:

Inform program design through...

Literature review

Program manager & contractor workshops

Market actor research

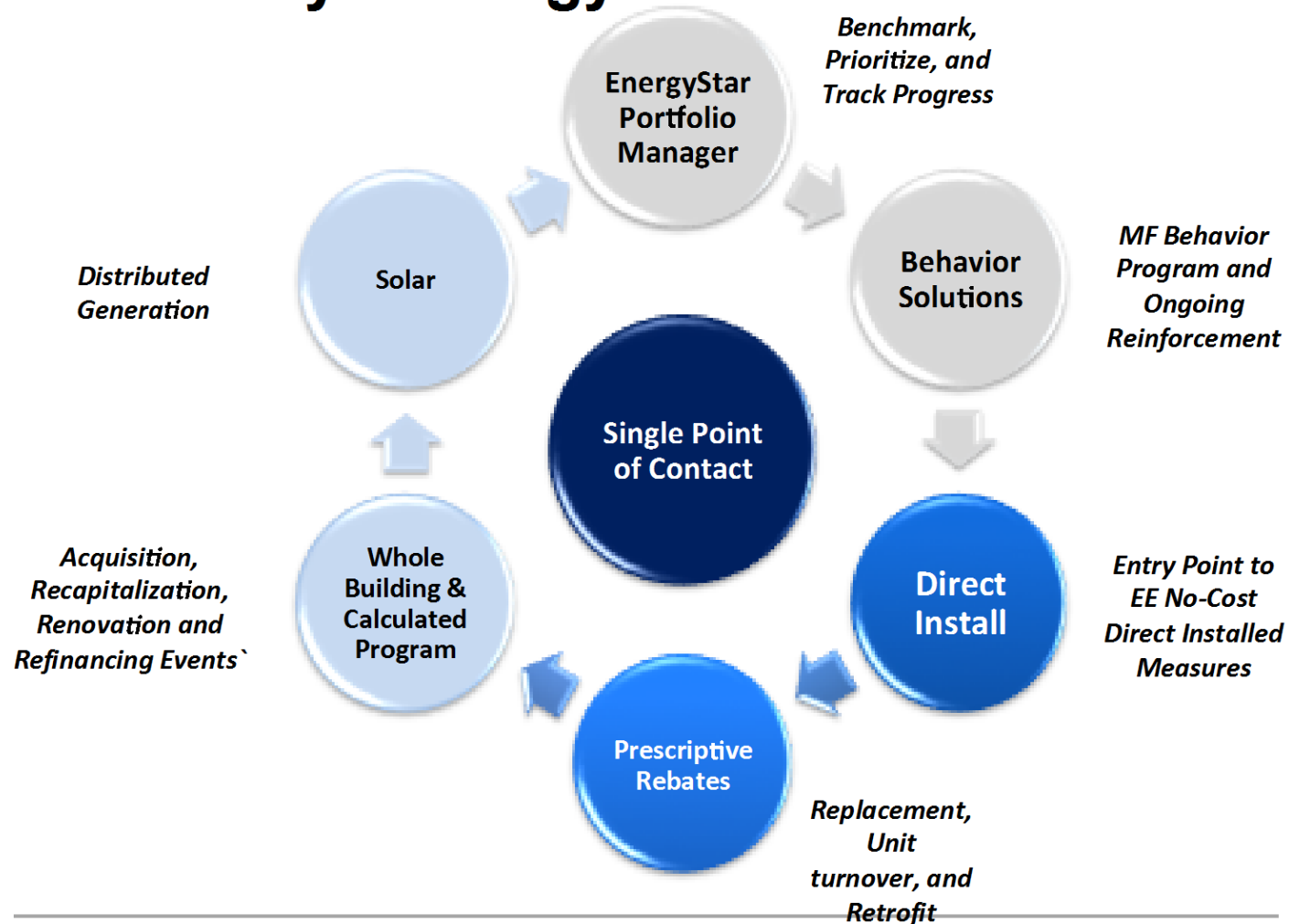
- Awareness and practices concerning energy efficiency
- Information sources
- Perceptions, experience, and satisfaction with programs
- Decision-making factors, drivers, and intentions to act

Laundry study

Building operator training study

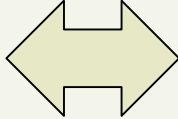
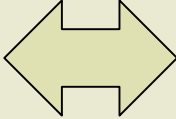
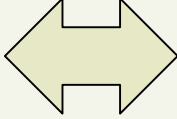
Program Concept

Multifamily Strategy





Understanding the Decision-Makers

Small MF owners	Medium	Large bldgs / portfolios
Up to 10 (or 20) units	In-between	51+ units and portfolios
<ul style="list-style-type: none"> Majority of units nationwide (2/3rds in bldgs below 20 units, NRDC) 		<ul style="list-style-type: none"> High economies of scale <ul style="list-style-type: none"> Outreach & engagement Centralized equipment
<ul style="list-style-type: none"> Wear many hats Immediate needs trump all May not be main job 		<ul style="list-style-type: none"> Owners and property managers May be regional or national Dedicated staff with energy or sustainability responsibilities
<ul style="list-style-type: none"> High flexibility Limited capacity (time and \$s) 		<ul style="list-style-type: none"> More capacity Flexibility within budget availability More "processes"



More flexibility than we expected for large portfolios

- Efficiency not just driven by ROI / payback
 - Property budget availability drives consideration (→ longer planning horizon)
 - High volume upgrades are attractive
 - Sustainability managers monitor utility programs (in SoCal)
- Authority depends on project size
 - Property site managers can approve small projects
 - Larger projects reviewed higher up

Single Point of Contact – still evolving



I would like a single point of contact.

I value the personal visits and discussions.

The program manager tells me about the offerings; the contractor tells me about technical opportunities and logistics.

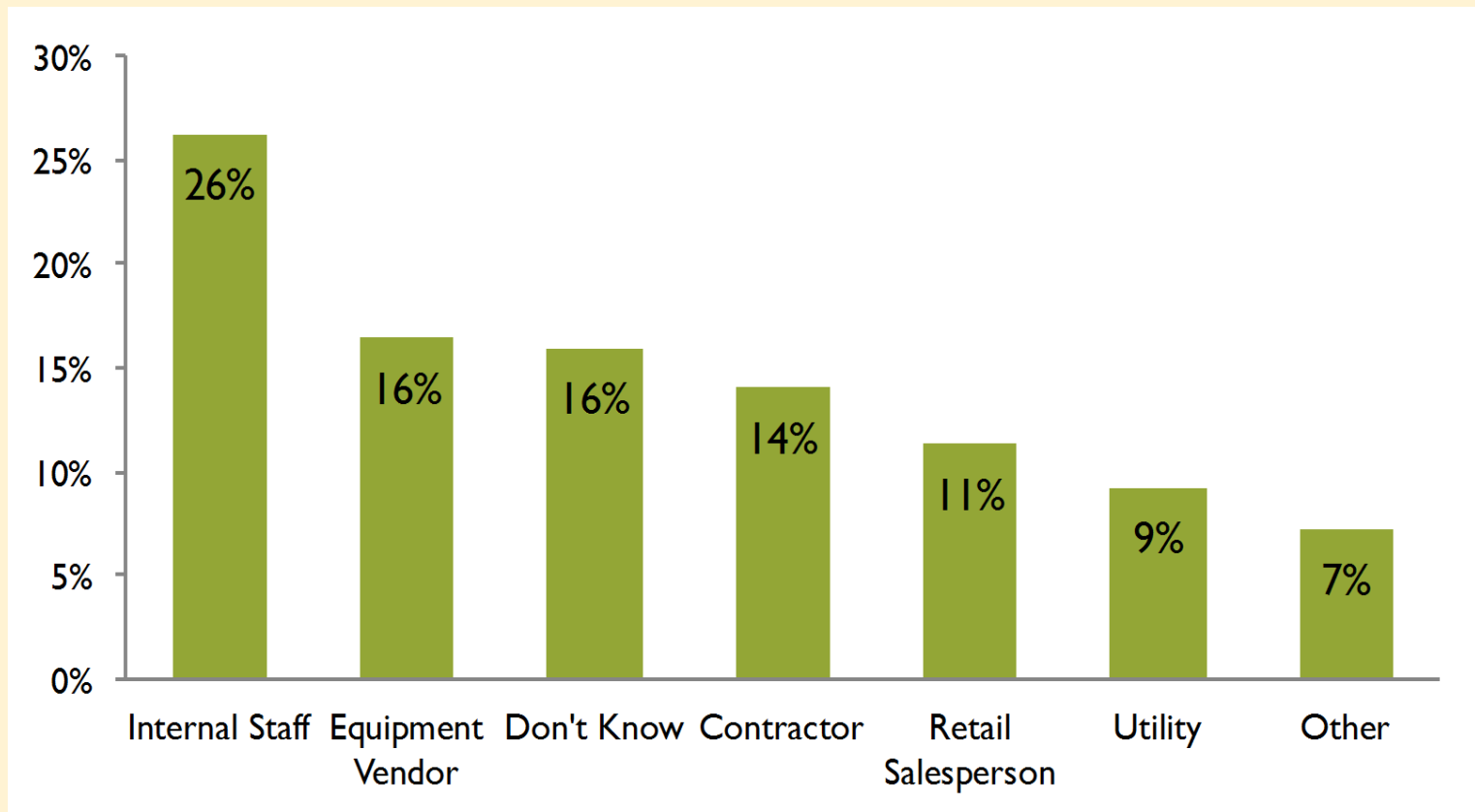
Efficiency, demand response, rates, billing, and customer service are all part of the utility offering.





Trusted Information Sources

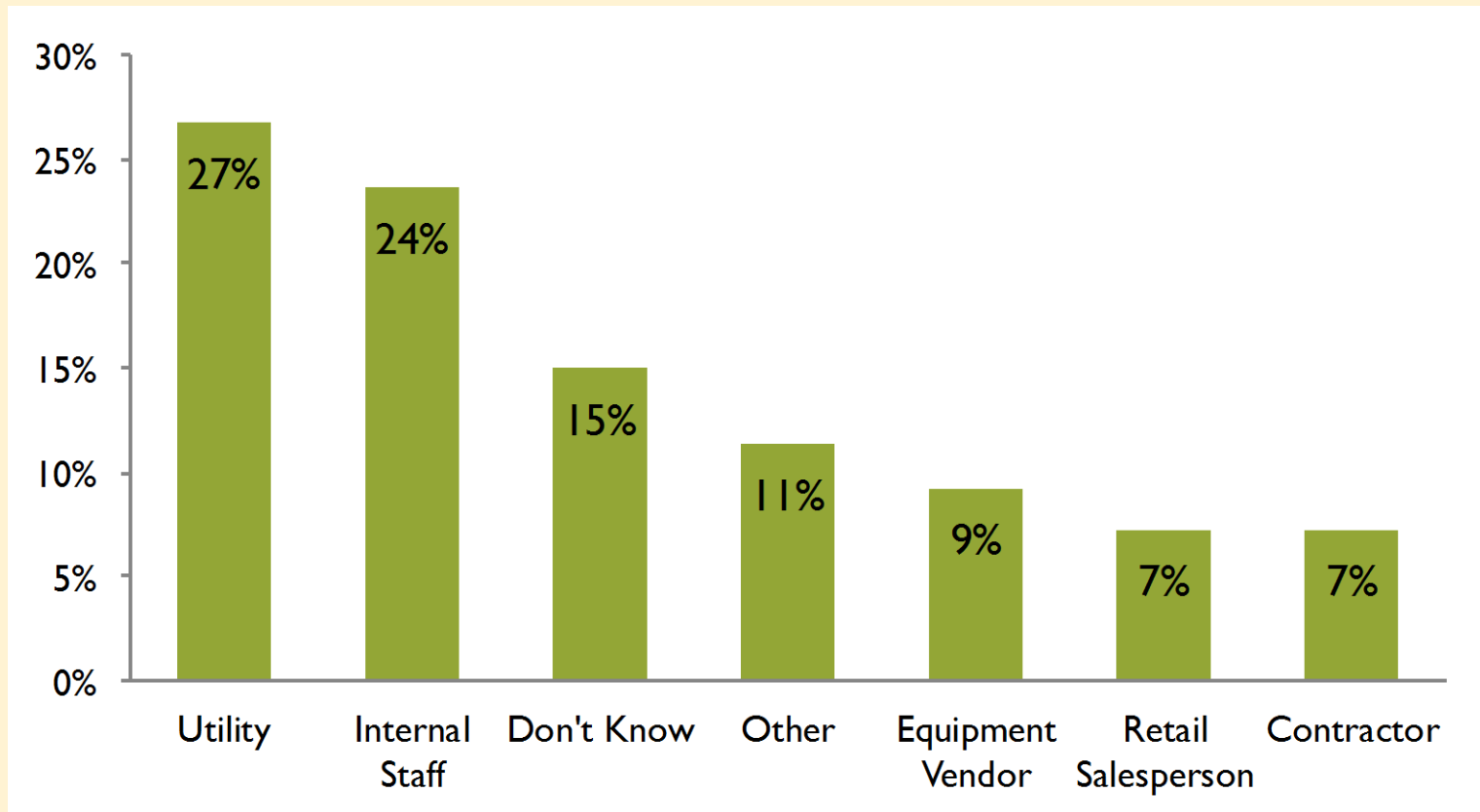
Internal staff and equipment vendors when thinking about energy-using equipment





Trusted Information Sources

Utilities and internal staff when thinking about energy efficiency



Contemplated next efficiency measure

When asked about their next efficiency upgrade, recent participants tend to think of ...





The offerings matter

Entry-level measure is valuable, but only the start

- Especially for smaller MF owners
- Start of a relationship (requiring follow-up)
- Customer not the efficiency expert

Consistent and predictable offerings matter

- Especially for portfolio manager



Guidance on what to do next

Tips & prescriptive measures

- For smaller MF owners
- Easy information, possibly with follow-up

Audits – formal and informal

- For larger MF owners
- Continuum from simple walk-throughs to full audits

Benchmarking

- Interest among portfolio mgrs; concern about time & effort
- Ordinances paving the way, but data issues



Relationship and tracking

The program relationship matters

- Utilities widely trusted on EE
- Small owners need gentle prompting and suggestions
- Portfolio managers value the personal contact and guidance

Value in picking up from prior conversation

- Requires tracking and coordination



Acknowledgments

California Utilities & CPUC

Piotr Urbanski
Caroline Chen
Corinne Sierzant
Rob Rubin
Tory Francisco
SCE, SoCalGas, and
SDG&E program teams

PWP Inc.

Philippus Willems

Evergreen Economics

Jenny Fraser
Martha Wudka
Joe Clark
John Cornwell
Keith Rivers
John Boroski
Tami Rasmussen
Steve Grover

CIC Research



Questions (and an invitation to talk more over coffee...)



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