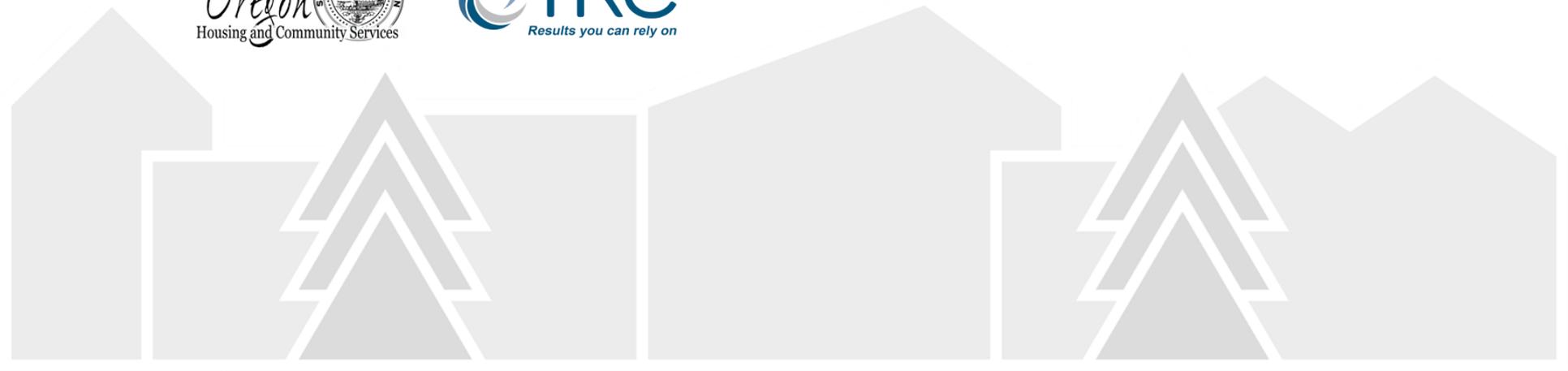


OREGON HOUSING & COMMUNITY SERVICES Multifamily Energy Program

Program Orientation

Date: January 10, 2018

Presenter: Stephanie Berkland

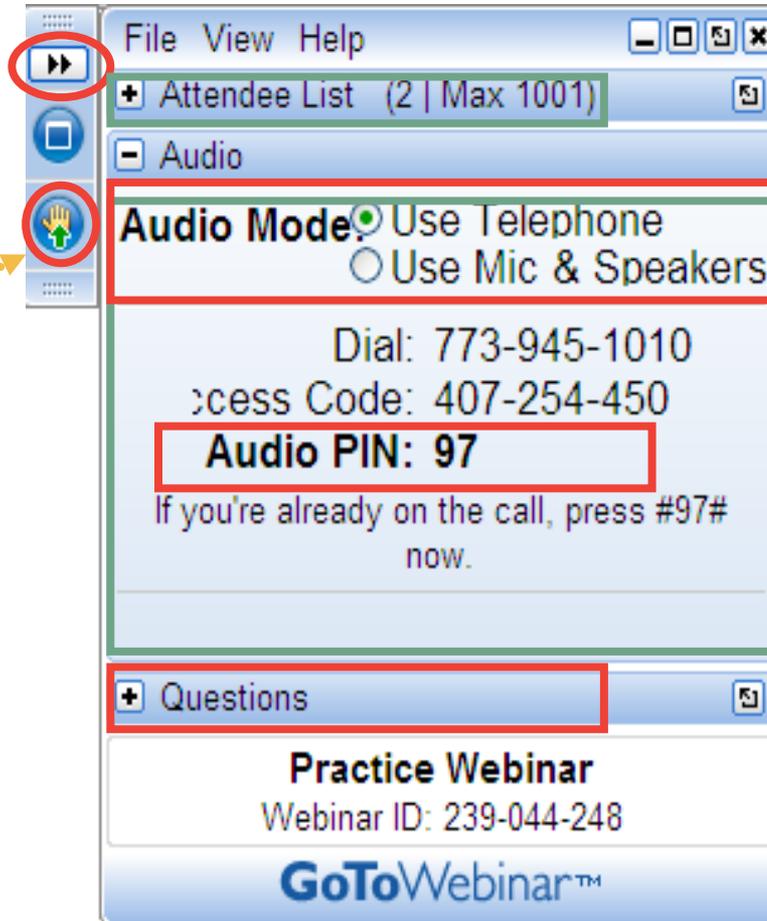


USING GOTOWEBINAR

Open and close
your **control panel**

Raise your hand
to ask questions
live

Questions will be
taken
at the end of the
presentation.



Choose **audio mode**

Enter your **audio pin**

Type **questions** in the chat box

AGENDA

- ◆ Program Overview
- ◆ Eligibility Requirements
- ◆ Program Pathways
- ◆ Existing Building Offerings
- ◆ New Construction Offerings
- ◆ How to Participate!



PROGRAM OVERVIEW

- ◆ TRC Energy Services administering on behalf of OHCS
- ◆ Formerly known as Low-income Weatherization Program
- ◆ Cash incentives for energy efficient upgrades
- ◆ Multifamily new construction and existing buildings
- ◆ In-unit and common area improvements
- ◆ Income-qualified properties
- ◆ NOFA and non-NOFA projects

PROGRAM FUNDING AVAILABILITY

- ◆ **\$2.6 Million in incentives:**
 - 50% Portland General Electric
 - 50% Pacific Power
 - \$500,000 reserved for projects outside OHCS' portfolio (50/50 between PGE and PAC)
- ◆ **Funding availability assessed on a quarterly basis**
- ◆ **\$200,000 incentive maximum per project (projects above max. evaluated on a case-by-case basis)**
- ◆ **Incentives reserved by December 31, 2018**

ELIGIBILITY REQUIREMENTS

- ◆ **Multifamily:**
 - Existing or New (5+ units)
 - High-rise and low-rise
- ◆ **Located in:**
 - Pacific Power or Portland General Electric
- ◆ **Tenants in at least 50% of units are at or below 80% AMI, 10 years affordability requirement**
- ◆ **Projects must be heated by a hard-wired electrical heating system to qualify for program funding**
- ◆ **Savings:**
 - Electric saving measures
 - Minimum efficiency requirements according to pathway chosen

FUNDING PRIORITIES

1. **OHCS NOFA awardees**
2. ***OHCS Bond program awardees**
3. **Unsuccessful NOFA & Bond applicants**
4. **Applicants not applying for NOFA or Bond programs**

*Related funding awards will require 60 years affordability and, depending upon the combination of involved funds, limit qualified tenants to not more than 50% or 60% AMI.

APPLICATION DEADLINES

1. OHCS NOFA awardees

- December 2017 LIFT
 - 21 days prior to LIFT application deadline
 - February LIFT application must include OR-MEP incentive reservation
- January 2018 9% LIHTC
 - 21 days prior to LIHTC application deadline
 - March Bond application must include OR-MEP incentive reservation

2. OHCS Bond program awardees

- No later than October 19th, 2018

3. Unsuccessful NOFA & Bond applicants

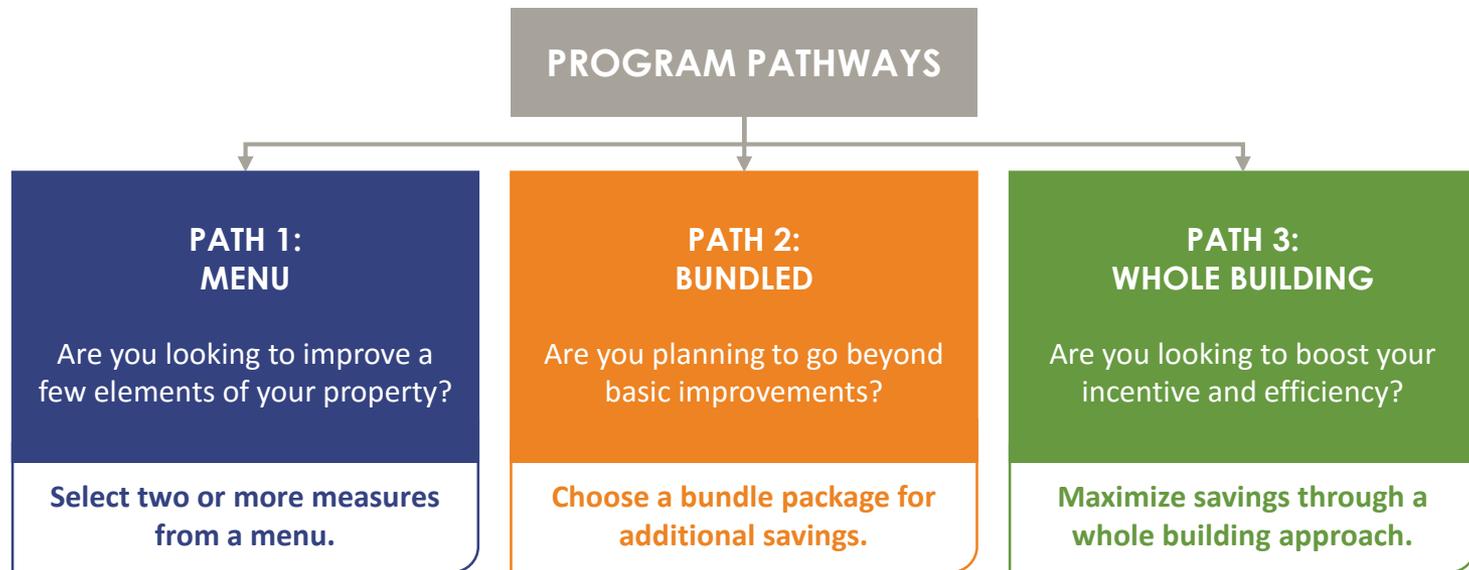
- No later than October 19th, 2018

4. Applicants not applying for NOFA or Bond programs

- No later than October 19th, 2018

PROGRAM PATHWAYS

- ◆ Existing multifamily and new multifamily both have three paths, suited for varying scopes of work
- ◆ Incentives escalate to reward more comprehensive design strategies



EXISTING MULTIFAMILY OFFERINGS

| | Path 1 Menu | Path 2 Bundle | Path 3 Whole Building |
|--------------|---|---|--|
| Project Need | Projects only interested in limited measure upgrades | Projects interested in multiple upgrades | Buildings in need of audit to identify comprehensive upgrades |
| Measures | Choose two measures in two different measure categories | Bundled packages to suit varying scopes of work and needs | Whole building improvements targeting deep energy savings |
| Incentive |  ~\$0.60 / kWh |  ~\$0.70 / kWh |  \$0.80 - \$1.00/ kWh |

EXISTING MULTIFAMILY OFFERINGS

Menu Path

- ◆ Points assigned relative to measure savings and costs
- ◆ Choose two measures in two different measure categories
- ◆ Menu Incentive = \$60/pt

MEASURE MENU

| Measure Category | Measure | Measure Unit | Points |
|------------------|------------------------------------|--------------|--------|
| Envelope | Windows | 100 sf area | 6 |
| Envelope | Attic/Ceiling Insulation | 100 sf area | 0.5 |
| HVAC | Ductless Heat Pump | Each | 15 |
| HVAC | Packaged Terminal Heat Pump | Each | 6 |
| HVAC | Smart Thermostat | Each | 1 |
| Hot Water | Heat Pump Water Heater | Each | 8.5 |
| Hot Water | Low Flow Showerhead | Each | 0.25 |
| Hot Water | Low Flow Aerator | Each | 0.25 |
| Appliances | Refrigerator | Each | 0.75 |
| Appliances | Common Area Clothes Washer | Each | 5.5 |
| Lighting | In-Unit LED Fixture | Each | 0.5 |
| Lighting | Common Area LED T8 Fixture | Each | 0.5 |
| Lighting | Interior Lighting Occupancy Sensor | Each | 1 |
| Lighting | LED Exit Sign | Each | 0.5 |
| Lighting | LED Exterior Wall Pack | Each | 1 |

EXISTING MULTIFAMILY OFFERINGS

Bundled Path*

| Pathway | Bundle Example | Total Points | Incentive |
|---|---|--------------|-------------------------------|
| The “Smart Apartment” Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> 1 Ductless Heat Pump (15 pts) 1 Smart Thermostat (1 pt) | 16.0 | \$1,120 (\$70 / pt) |
| The “DHW” Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> 1 Heat Pump Water Heater (8.5 pts) 1 Low Flow Showerhead (0.25 pt) 1 Low Flow Aerator (0.25 pt) | 9.0 | \$630 (\$70 / pt) |
| The “Envelope” Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> 100 sf Windows (6 pts) 100 sf Attic / Ceiling Insulation (0.5 pt) | 6.5 | \$455 (\$70 / pt) |
| The “Unit Turnover” Bundle <i>Choose at least 3 in-unit upgrades.</i> | <ul style="list-style-type: none"> 1 Low Flow Showerhead (0.25 pt) 1 Low Flow Aerator (0.25 pt) 3 In-Unit LED Fixtures (1.5 pt) 1 Refrigerator (0.75 pt) | 2.75 | \$193 (\$70 / pt) |
| The “Lighting” Bundle <i>Choose at least 3 lighting upgrades.</i> | <ul style="list-style-type: none"> 3 In-Unit LED Fixtures (1.5 pts) 2 Common Area LED T8’s(1 pt) 1 LED Exit Sign (0.5 pt) 2 LED Exterior Wall Packs (2 pts) | 5.0 | \$350 (\$70 / pt) |
| Build Your Own Bundle <i>Minimum of three measures in two upgrade categories.</i> | <ul style="list-style-type: none"> 1 Packaged Terminal Heat Pump (6 pts) 3 In-Unit LED Fixtures (1.5 pts) 1 Refrigerator (0.75 pt) | 8.25 | \$578 (\$70 / pt) |

*Only one bundle may be pursued in Bundle Path. Project interested in a larger work scope are recommended to use the Whole Building Path

EXISTING MULTIFAMILY OFFERINGS

Whole Building Path

- ◆ Three incentive tiers based on percent savings over existing conditions
- ◆ Requires whole building audit and energy modeling by independent third-party

| Tier | Savings Threshold | Incentive |
|--------|--|--------------------|
| Tier 1 | ≥ 20% kWh savings from existing conditions | \$0.80 / kWh saved |
| Tier 2 | ≥ 25% kWh savings from existing conditions | \$0.90 / kWh saved |
| Tier 3 | ≥ 30% kWh savings from existing conditions | \$1.00 / kWh saved |

NEW CONSTRUCTION OFFERINGS

| | Path 1 Menu | Path 2 Bundle | Path 3 Whole Building |
|--------------|---|--|--|
| Project Need | Projects only interested in specific efficient equipment | Projects not able to complete modeling, but interested in cost-effective measures that have proven savings | Whole building model + verification |
| Measures | Equipment specific measures (PTHP, DHP, HPWH) | High efficiency building component bundles (Envelope, DHW, HVAC) | All modeled building systems with electric savings |
| Incentive |  ~\$0.60 / kWh |  ~\$0.70 / kWh |  \$0.80 - \$1.00/ kWh |

NEW CONSTRUCTION OFFERINGS

Menu Path

- ◆ Menu path limited to equipment measures
- ◆ Menu Incentive = \$60 / point

| Measure | Measure Unit | Points | Incentive/Unit |
|------------------------------------|--------------|--------|----------------|
| High Efficiency PTHP | per apt unit | 5 | \$300 |
| High Efficiency Ductless Heat Pump | per apt unit | 5 | \$300 |
| Heat Pump Water Heater | per apt unit | 3.5 | \$210 |

NEW CONSTRUCTION OFFERINGS

Bundled Path*

| Bundle Name* | Bundle Example (for 1 apartment unit)** | Total Points | Incentive |
|--|---|--------------|-----------------------------|
| HVAC Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> High Efficiency Heating System: PTHP or DHP (5.0 pts) Efficient HVAC Fan Motors (0.5 pt) Efficient Balanced Ventilation (4.5 pts) Smart Thermostat Controls (0.5 pt) | 10.5 | \$735 (\$70 / pt) |
| Envelope Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> High Performance Envelope (6.0 pts) Efficient Windows (1.5 pts) Reduced Infiltration (2.0 pts) | 9.5 | \$665 (\$70 / pt) |
| DHW Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> Heat Pump Water Heater (3.5 pts) Low Flow Fixtures (0.25 pt) | 3.75 | \$263 (\$70 / pt) |
| Appliances & Lighting Bundle <i>Must include the following measures:</i> | <ul style="list-style-type: none"> ENERGY STAR Appliances (1 pt) High Efficiency Lighting (Apt & Common Area) (0.75 pt) Common Area Lighting Controls (0.5 pt) High Efficiency Exterior Lighting (0.5 pt) | 2.75 | \$193 (\$70 / pt) |

*Only one bundle may be pursued in Bundled Path. Project interested in a larger work scope are recommended to use the Whole Building Path

**Measure units for all new construction bundle measures are *per apartment unit*.

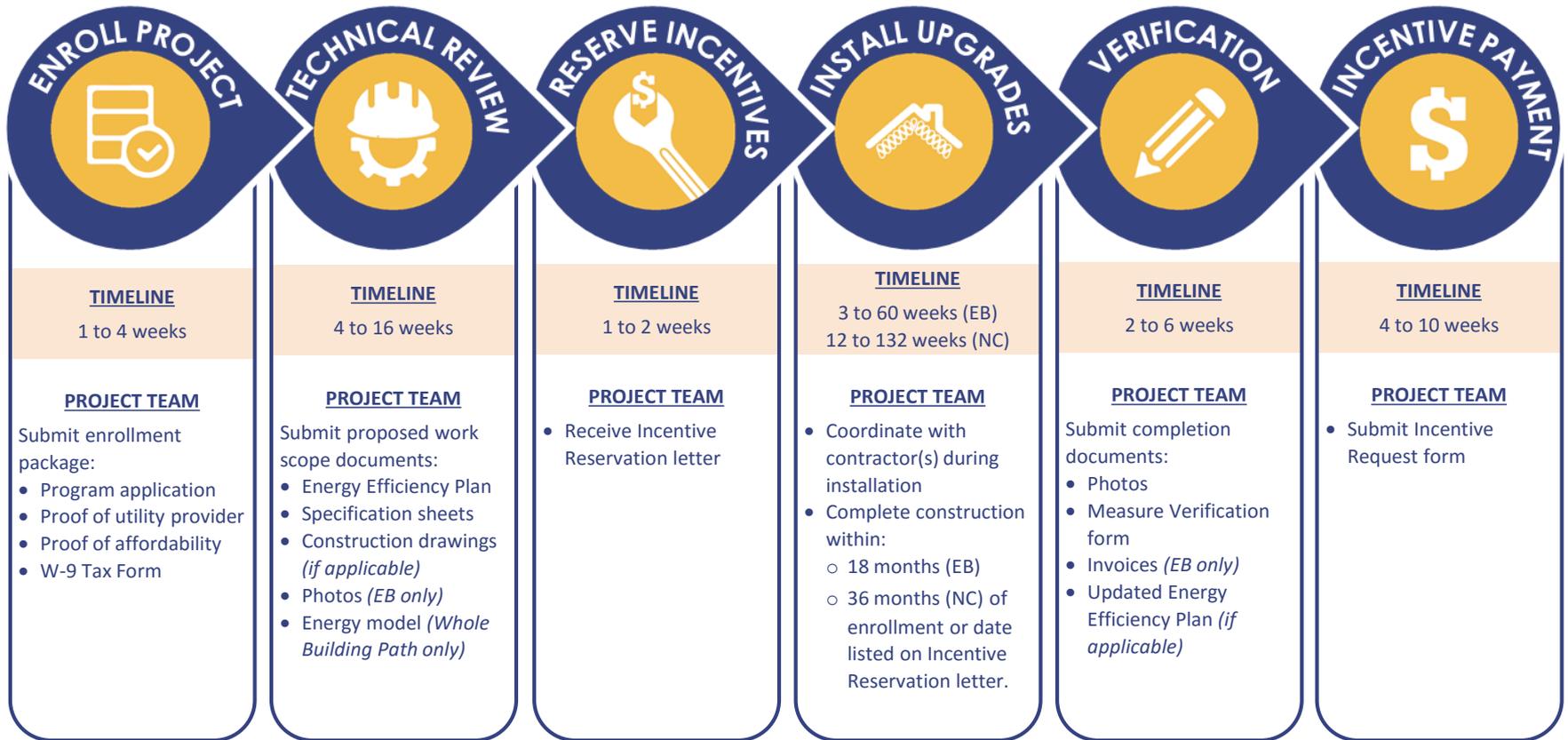
NEW CONSTRUCTION OFFERINGS

Whole Building Path

- ◆ Three incentive tiers based on percent savings over code baseline
- ◆ Requires energy modeling by independent third-party.

| Tier | Savings Threshold | Incentive |
|---------------|---|--------------------|
| Tier 1 | ≥ 20% kWh savings compared to code baseline | \$0.80 / kWh saved |
| Tier 2 | ≥ 25% kWh savings compared to code baseline | \$0.90 / kWh saved |
| Tier 3 | ≥ 30% kWh savings compared to code baseline | \$1.00 / kWh saved |

PARTICIPATION PROCESS



HOW TO PARTICIPATE

Fill out an interest form at:
OregonMultifamilyEnergy.com

A program representative will follow up to discuss opportunities for your project.

OREGON HOUSING & COMMUNITY SERVICES
Multifamily Energy Program

CASH INCENTIVES AND DESIGN SUPPORT FOR AFFORDABLE MULTIFAMILY RETROFITS AND NEW CONSTRUCTION

PROGRAM PATHWAYS

| | | |
|--|--|---|
| PATH 1: MENU Are you looking to improve a few elements of your property? Select two or more measures from a menu. | PATH 2: BUNDLED Are you planning to go beyond basic improvements? Choose a bundle package for additional savings. | PATH 3: WHOLE BUILDING Are you looking to boost your incentive and efficiency? Maximize savings through a whole building approach. |
|--|--|---|

CONTACT US TO GET STARTED:
www.oregonmultifamilyenergy.com
OHCSMultifamilyEnergy@trcsolutions.com
503.505.6787

Is your project eligible for the Multifamily Energy Program?
Submit this interest form to learn more!

Property
Name: _____
City: _____
Units: _____
 New construction Existing property

Estimated construction timeline
Start date: _____
Stop date: _____

Developer or property owner/manager
Company: _____
Contact: _____
Email: _____
Phone: _____

If existing property, indicate planned energy upgrades

| | |
|--|-------------------------------------|
| <input type="checkbox"/> Windows | <input type="checkbox"/> Insulation |
| <input type="checkbox"/> Water heating | <input type="checkbox"/> Appliances |
| <input type="checkbox"/> Air conditioning | <input type="checkbox"/> Heating |
| <input type="checkbox"/> Low flow fixtures | <input type="checkbox"/> Lighting |

CONTACT INFORMATION

Multifamily Energy Program

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THANK YOU!

QUESTIONS?