

Matrix of Utility Multifamily Energy Efficiency & Renewable Incentive Programs in California
 Prepared by the California Housing Partnership
 August 31, 2015

Utility Retrofit Incentive Programs							
Program Name	Description	Incentive Value	Delivery Model	Audit Requirement/Incentives	Type of Measures or Minimum Improvement Requirements	Eligibility	Utility Territories Covered
Energy Savings Assistance Program (ESAP)	ESAP offers No-cost direct installation of in-unit measures for income qualified households. Requires tenant income verification, and does not allow owners to choose contractors.	Direct Install (no cost) Utilities report spending an average of \$500-\$1,500 per LI MF unit, including their costs to administer the program. The actual value to each LI MF unit will vary both by the particular measures installed and by each utility's ESAP provider's administrative costs.	Contractors selected by each utility solicit low income households directly. Installation typically does not include property owner, however owner authorization may be required for select measures.	No audit. Per unit assessment to determine eligibility and measure selection.	Measures vary by utility. Examples include: attic insulation, refrigerators, furnaces, microwaves, clothes washers, weather-stripping, caulking, low-flow showerheads, water heater blankets, and door and building envelope repairs.	<u>Maximum household income is 200% of federal poverty guidelines.</u>	PG&E SDG&E SCE SoCalGas
Energy Upgrade California for Multifamily (EUC)	Pilot program offering set incentives for achieving specific savings targets using a whole-building energy efficiency retrofit approach. An energy consultant provides limited technical assistance to the property owner and helps the owner access other utility incentive programs (including water). Program models savings over existing conditions. Ideal for integration with planned rehab project.	Tiered value based on percentage savings: SoCalGas/SCE: \$700/unit to \$1,600/unit. SDG&E: \$550/unit to \$1,500/unit. PG&E: \$600/unit to \$2,500/unit.	Owner hires qualified partners; Rater performs audit, contractors perform installation. Incentive paid at project completion.	ASHRAE Level II by approved rater. SCE/SoCalGas: Cost of audit covered by approved rater. SDG&E: No audit incentives offered PG&E: Up to \$20,000.	Minimum of 10% energy savings over existing conditions.	SoCalGas/SCE: ≥3 units. Served by both utilities SDG&E: ≥5 units; must typically install ≥3 eligible measures PG&E: ≥5 units First come, first served basis.	PG&E SDG&E SCE SoCalGas
Middle Income Direct Install Program (MIDI)	No-cost direct-install energy efficiency measures for moderate-income participants who do not meet income qualifications under ESAP. Measures may include some common area upgrades. Requires tenant income verification; does not allow owners to choose contractors.	No-cost. Utilities report spending an average of \$500-\$1,500 per LI MF unit.	Installed by contractor selected by utility.	No audit. Contractor assesses each unit to determine eligibility and measure selection.	Measures vary by utility. Examples include: showerheads, aerators, heating system, indoor lighting (light bulbs, fixtures, controls), pool/spa lighting, ceiling fans, clothes washers, attic insulation, pipe wrap water heater blankets.	<u>Households with incomes of 200%-400% of federal poverty guidelines.</u>	PG&E SDG&E SoCalGas
Multi-Family Energy Efficiency Rebate Program (MFEER)	MIDI offers incentives for owner installation of energy efficiency measures in individual units and common areas of multifamily dwellings.	Varies by utility and product purchased.	Owner chooses from a catalog of qualifying measures, completes installation, and receives rebates. Some products may require installation by qualified contractor.	No audit required. SCE offers high-level energy assessments to identify qualification/eligibility of no-cost measures.	Measures vary. Examples include lighting, building envelope repairs, water heaters, HVAC upgrades, appliances, and plumbing.	Eligible products must be purchased and installed to qualify. Available on a first come, first served basis.	PG&E SDG&E SCE SoCalGas
New Construction Incentive Programs							
California Multifamily New Homes Program (CMFNH)	Promotes energy efficient design in new construction low-rise and high-rise multi-family housing through design assistance, cash payments, and education.	Low-rise (1-3 stories): \$75/unit base incentive for 15% above 2013 Title 24 standards or CMFNH score of 84. Additional incentive for higher CMFNH score. High-rise (4+ stories): \$150/unit for 15% above 2013 Title 24. \$400/unit for 30% above. Energy consultant: \$50 per unit with 200 unit limit. HERS (issued to developer): \$60 per unit with 200 unit limit.	Owner chooses independent energy consultant/contractor, approved by program. Incentive paid at project completion.	All projects must contract with certified HERS rater.	Minimum of 15% above 2013 Title 24 or CMFNH score of 84.	≥3 units. New construction in PG&E territory. Exceed 2013 Title 24 by at least 15%. Complete construction and verification by December 31, 2018.	PG&E
California Advanced Homes Program (CAHP)	Residential new construction program that encourages the incorporation of sustainable design and construction practices, with two goals in mind: 1) Encourage builders build homes above and ahead of the code, and 2) Help meet the state's goal of reach Zero Net Energy for all new home by 2020.	Low rise (1-3 stories): \$150/unit for program entry CAHP score of 84. Additional incentives for higher CAHP score. High rise (≥4 stories): \$150/unit for 15% above 2013 Title 24. \$400/unit for above 30%. Additional financial incentives offered for low rise: (1) Building to future code, (2) DOE Zero Energy Ready Home Certification	Owner chooses independent energy consultant/contractor, approved by program. Incentive paid at project completion.	All projects must contract with certified HERS rater.	Minimum of 15% above 2013 Title 24.	Must demonstrate compliance with 2013 Title 24 Standards. Must contract with a Certified Energy Analyst (CEA).	SDG&E SCE SoCalGas SoCalGas-LADWP
Regional and Utility Retrofit Programs							
SMUD Multi-family Prescriptive Rebates	Offers fixed rebates for the installation of qualified energy-efficiency products in existing apartments, and common areas.	Varies by product.	Owner self-installs or hires any contractor and mails-in itemized list of measures and receives rebate	No audit.	Measures vary. Examples include HVAC and lighting.	≥3 units. Submit program rebate reservation worksheet. First come, first serve basis.	SMUD

Program Name	Description	Incentive Value	Delivery Model	Audit Requirement/Incentives	Type of Measures or Minimum Improvement Requirements	Eligibility	Utility Territories Covered
SMUD Home Performance Program Multifamily (HPP-MF)	SMUD's version of the Energy Upgrade California: the program offers incentives for a whole-building energy efficiency retrofit approach. An energy consultant offers free technical assistance to owner throughout retrofit and HPP-MF process, and connects owners with other incentives (including water). Program models savings over existing conditions. Ideal for integration with planned rehab project.	Performance-based incentive (only electric Kwh)- \$25 per 1% Kwh improvement/unit; maximum is \$1,250/unit or up to 50% savings	Owner chooses independent auditor and contractor, approved by program. Incentive paid at project completion.	HERS II approved rater energy assessment using Energy Pro software modeling.	Minimum of 10% energy improvement over existing conditions.	≥3 units. First come, first served basis.	SMUD
Marin Clean Energy (MCE) Multifamily Program	MCE's multifamily energy efficiency program available to both market rate and affordable customers in MCE territory. Offers no-cost technical assistance to develop scope of work and solicit bids. Also offers direct-install measures for tenant units.	Rebates averaging 25-60% of project costs. Points based system; each measure is assigned a point, and points are multiplied by number of units to project rebate.	MCE provides technical assistance, assessment, and assistance with selecting contractor. Owner chooses contractor. Incentive paid at project completion.	Site visit and audit provided by technical assistance at no cost to owner.	No minimum savings requirements.	≥4 units. first-come, first-serve basis.	Marin, Unincorporated Napa County, City of Richmond, San Pablo, Benicia, and El Cerrito.
Bay Area Multifamily Building Enhancements (BAMBE or BAYREN)	Pilot program offering incentives for a whole-building energy efficiency retrofit approach. An energy consultant offers free technical assistance to work with owner throughout the retrofit process, and connect to other incentive programs (including water). Program models savings over existing conditions. Ideal for integration with planned rehab project.	\$750/unit for savings of at least 10% savings.	No-cost technical assistance. Incentive paid at project completion.	Site Visit and audit provided by technical assistance at no cost to owner.	Minimum of 10% energy improvement over existing conditions.	≥5 units, install 2 or more eligible measures. Available on a first-come, first-served basis.	Must have PG&E service in one of the following counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma
Southern California Regional Energy Network (SoCalRen or the Energy Network)	Pilot program offering incentives for a whole-building energy efficiency retrofit approach. An energy consultant offers free technical assistance to work with owners throughout the retrofit process, and connects to other incentive programs (including water). Program models savings over existing conditions. Ideal for integration with planned rehab project.	Up to \$550/unit for savings of at least 10% savings.	Owner hires qualified partners; Rater performs audit, contractors perform installation. Incentive paid at project completion	Owner's choice of independent approved auditor; \$5,000-\$10,000.	Minimum of 10% energy improvement over existing conditions.	≥5 units. Install 3 or more eligible measures. Available on a first come, first-served basis.	Serving the following counties: Los Angeles, San Bernardino, Riverside, Ventura, Inyo, Imperial, and Mono, and portions of Orange, Kern Tulare, Santa Barbara, and Kings.
SoCalGas-LADWP Energy Upgrade Program	SoCalGas and LADWP offer a joint EUC pilot program for the City of Los Angeles. The SoCalGas/LADWP EUC pilot uses a whole-building performance-based retrofit approach.	Tiered value based on percent improvement: \$420 to \$960 per unit.	Owner enrolls in program. Audit is performed by program for approved projects. Owner's contractor performs installation. Incentive paid at project completion.	ASHRAE Level II by approved program rater. Program covers cost of audit.	Minimum of 10% energy improvement over existing conditions.	≥3 units. Served by both utilities. First come, first served basis.	SoCalGas-LADWP
LADWP Consumer Rebate Residential Programs	Offers rebates for the installation of qualified energy-efficiency products in existing apartment units.	Varies by product; examples include: \$65 for ENERGY STAR Refrigerator \$100-\$120/per ton for HVAC \$200 per unit for whole house fan.	Owner submits application after purchase and installation of measures. Verification inspection may be requested before rebate payment is issued.	No audit.	Measures vary. Examples include: Energy Star (ES) refrigerator, ES windows, cool roofs, ES room AC, energy efficient AC and heat pumps, whole-house fan, variable speed pool pump and motor.	First come, first serve basis.	LADWP
LADWP Home Energy Improvement Program (HEIP)	LADWP's no-cost direct install program for in-unit measures. HEIP requires participation by a minimum of 50% of the residents in any multifamily building. Program offers customers a home assessment to identify the most appropriate and effective improvement at no-cost. Program does not allow owners to choose contractors.	Direct install (no cost).	Contractor approved and selected by utility.	No Audit. Home assessment and report issued by technicians.	Blower door test, air sealing, insulation, door repair replacement, window repair and glass replacement, replace AC, duct leakage diagnostics and repair, repair or property vent combustion systems, low-flow toilets, low-flow showerheads, low-flow faucet aerators.	No income qualification required. First come, first serve basis.	LADWP
Federal and State Retrofit Programs							
Federal Weatherization Assistance Program (WAP)	Federally-funded weatherization program administered by the California Department of Community Services and Development (CSD).	Direct install (no cost)	Local service providers install measures. Only specific service providers authorized to participate in MF program.	Audit required to participate in MF version of program.	Varies by local service provider. Low-flow showerheads, weather-stripping, appliances, heating/cooling system repair, ceiling fans, water heater blankets, light bulbs, insulation, microwaves, solar water heating.	Income guidelines set at or below 60% of state median income. All buildings can be weatherized when 66% of units are determined to be eligible.	Statewide
Low Income Home Energy Assistance Program (LIHEAP)	Federally funded assistance program administered by CSD that provides direct financial assistance to eligible low income households to offset heating and cooling costs.	Tenant-based incentive	Direct monetary assistance to tenants	N/A	Types of assistance to tenants varies. Examples include: utility bill assistance, emergency assistance to prevent home energy shut-off, emergency heating and cooling repair	Income guidelines set at or below 60% of state median income.	Statewide
Low Income Weatherization Program (LIWP) - Small Multifamily	Small Multifamily Cap-and-trade funded retrofit program administered by CSD for eligible small properties where units have own water heater and own heating/cooling system. Program will offer energy efficiency, solar water heating, and solar PV incentives. CSD will leverage LIWP work with its existing federal LIHEAP funds.	No-cost	Local service providers install measures.	No audit.	Eligible measures include wall/floor/ceiling insulation, window replacement, water flow restrictors, lighting measures, replacement of cooling system, "Smart" power strips, water heater repair/replacement, water heater blanket, solar water heater, microwave oven, ceiling fans, and refrigerator replacement, solar pv, among others	≥5 units; each unit served by own hot water and heating/cooling system. Meet WAP/LIHEAP income requirement and be located in a Disadvantaged Communities (DACs), as defined by CalEPA's CalEnviroScreen 2.0 Tool. First come, first serve basis.	Statewide in Disadvantaged Communities
Low Income Weatherization Program (LIWP) - Large Multifamily	Cap-and-Trade funded retrofit program administered by Association for Energy Affordability (AEA). Program will offer energy efficiency, solar water heating, and solar PV incentives. In addition to these incentives, the program also encourages leveraging external rebates to maximize the potential to reduce green house gas (GHG).	Whole-building retrofit approach that emphasizes cost-effective measures and yields GHG reductions in relation to the energy savings per dollar. AEA to perform whole building audits and analysis.	Program Guidelines Currently Under Development:			≥20 units; served by central hot water and heating/cooling system. Meet program income requirements and be located in DACs. First come, first serve basis.	Statewide in Disadvantaged Communities

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Program Name	Description	Incentive Value	Delivery Model	Audit Requirement/Incentives	Type of Measures or Minimum Improvement Requirements	Eligibility	Utility Territories Covered
Solar and Domestic Hot Water Programs							
California Solar Initiative (CSI) Multifamily Affordable Solar Housing (MASH)	Provides incentives to offset the cost of installing solar on existing qualifying low-income multifamily affordable housing.	Offers incentives for installation of up to 1 MW of PV capacity: Track 1C: PV system offsetting common area load, non virtual net metering (VNM) tenant load, or VNM tenant load with <50% tenant benefit: \$1.10/watt Track 1D: PV system offsetting VNM Tenant Load with ≥50% tenant benefit : \$1.80/watt	Owner, or designated third party, may apply. Installation may be completed by owner or licensed contractor. Incentive paid at project completion.	ASHRAE Level I or Higher, OR enroll in a utility energy efficiency program (e.g. EUC), Regional Energy Network, Community Choice Aggregator, or federally provided multifamily energy efficiency program (e.g. WAP or LIHEAP)	Photovoltaics	In addition to audit requirement, contractors must provide a job training opportunity to more than one trainee, with one additional trainee for each 10kW up to 50 kW. Program currently has a wait list. Program administrators expect to determine in mid-September 2015 if there will be funding remaining to accept new applications.	PG&E SDG&E SCE
California Solar Initiative (CSI) Thermal Program	Offers rebates for installing solar thermal systems to replace water-heating systems powered by electricity and natural gas.	Up to \$800,000 per property. Gas payment = \$24.89/therm, Electric payment = \$.42/Kwh	Owner chooses licensed solar contractor approved by the utility, which pays the incentive at project completion.	Owner must provide an energy efficiency audit or survey completed within the last three years.	Solar water heating systems.	System must displace natural gas, electricity, or propane. Self-installations are permitted.	PG&E SDG&E SCE SoCalGas
New Solar Homes Partnership - New Construction	Provides rebates and technical assistance to encourage the installation of solar serving the residential portion of multifamily new construction.	Tiered value based on percentage savings: \$1.00/watt for Tier I: Exceeding 2013 Title 24 Standards by 15% \$1.50/watt for Tier II: Exceeding Title 24 Standards by 30% \$.75/watt for baseline 2013 Title 24 compliance \$1.85/watt for affordable housing incentive:	Owner, developer, or builder chooses licensed solar contractor approved by CEC, which pays the incentive at project completion.	No audit required.	Flat-plate photovoltaics.	Must comply with 2013 Title 24 Standards. Program encourages participation in utility energy efficiency programs before applying.	PG&E SDG&E SCE
LADWP Solar Incentive Programs (SIP)	SIP Provides a lump-sum payment to customers that purchase or lease PV systems to offset traditional energy consumption at the installation site. SIP provides additional funding triggers for qualified affordable Housing.	Incentive varies by expected system performance and whether customer elects to retain ownership of the system. Non-residential (Qualified Affordable Housing) Incentive Level: \$1.45/watt	Owner chooses licensed solar contractor and submits SIP application. Owner obtains incentive confirmation prior to installation. System is installed and inspected by LADWP prior to issuing payment.	Existing buildings: audit required New construction: demonstrate 15% above Title 24 standards	Solar panels for electricity generation.	At least 50% of units must be reserved affordable to households at or below 80% of Area Median Income. Affordability term maintained for at least 10 years.	LADWP

PROGRAM CONTACT INFORMATION

	PG&E	SDG&E	SCE	SoCalGas	SMUD	LADWP
Energy Efficiency Program Single-Point-of-Contact	Karen Contreras KxCt@pge.com (415) 973-1022	Cheryl Lacombe clacombe@trcsolutions.com (916) 844-0092	Jose Buendia jose.buendia@sce.com (626) 302-0714	Mark Reyna MReyna@semprautilities.com (213) 244-3475	Misha Sarkovich MSarkov@SMUD.org (916) 732-6484	
Utility Retrofit Incentive Programs						
Energy Savings Assistance Program (ESAP)	Mary O'Drain Mjob@pge.com (415) 973-2317	Chuck Berry Cberry@semprautilities.com (858) 650-4114	John Fasana john.fasana@sce.com (626) 302-5236	Mark Aguirre maaguirre2@semprautilities.com (213) 244-3281		
Middle Income Direct Install Program (MIDI)						
Energy Upgrade California for Multifamily (EUC)	Mike Maroney mmaroney@trcsolutions.com (916) 962.7001	Cheryl Lacombe clacombe@trcsolutions.com (916) 844-0092	Jose Buendia jose.buendia@sce.com (626) 302-0714	Mark A. Reyna MReyna@semprautilities.com (213) 244-3475		
Multifamily Energy Efficiency Rebate Program	(800) 933-9555	(800) 644-6133	(800) 736-4777	(800) 508-2348		
New Construction Incentive Programs						
California Multifamily New Homes Program (CMFNH)	cmfnh@h-m-g.com (866) 352-7457					
California Advanced Homes Program (CAHP)	cmfnh@h-m-g.com (866) 352-7457	NewHomes@sdge.com (866) 631-1744	Monica.Leong@sce.com (626) 622-9182	NewHomes@socialgas.com (866) 563-2637		
Regional and Municipal Retrofit Programs						
Marin Clean Energy (MCE) Multifamily Program	energysavings@mceCleanEnergy.org (415) 464-6033					

Regional and Municipal Retrofit Programs	
Bay Area Multifamily Building Enhancements (BAMBE or BAYREN)	Miya Kitahara miya@stopwaste.org (510) 891-6558
LADWP Consumer Rebate/Residential Programs	crp@ladwp.com (800) 374-2224
LADWP Home Energy Improvement Program (HEIP)	help@ladwp.com (888) 822-8497
LADWP-SoCalGas Energy Upgrade Program	Mark Reyna MReyna@semprautilities.com (213) 244-3475
Southern California Regional Energy Network (also known as the Energy Network)	Lamultifamily@builditgreen.org (213) 688-0070
SMUD Multifamily Prescriptive Rebates	Misha Sarkovich MSarkov@SMUD.org (916) 732-6484
SMUD Home Performance Program (HPP)	
Federal and State Retrofit Programs	
Federal Weatherization Assistance Program	Locate service providers in your area
Low Income Weatherization Program (LIWP) - Small Multifamily	Locate service providers in your area
Low Income Weatherization Program (LIWP) - Large Multifamily and Small Multifamily PV	Jessica Tse jtse@aea.us.org (510) 270-4956

Solar and Domestic Hot Water Programs						
California Solar Initiative (CSI) - Multifamily Affordable Solar Housing (MASH)	solar@pge.com (877)-743-4112	csi@energycenter.org (858) 244-1177	NSHP@sce.com (866) 584-7436			
California Solar Initiative (CSI) -Solar Water Heating Program		sw@energycenter.org (858) 244-1177	CSIGroup@sce.com (866) 584-7436	sw@SoCalGas.com (800) 427-2000		
New Solar Homes Partnership - New Construction	Renewable@energy.ca.gov (844) 217-4925					
LADWP Solar Incentive Programs (SIP)	solar@ladwp.com (866) 484-0433					