



Existing Multifamily Program Updates

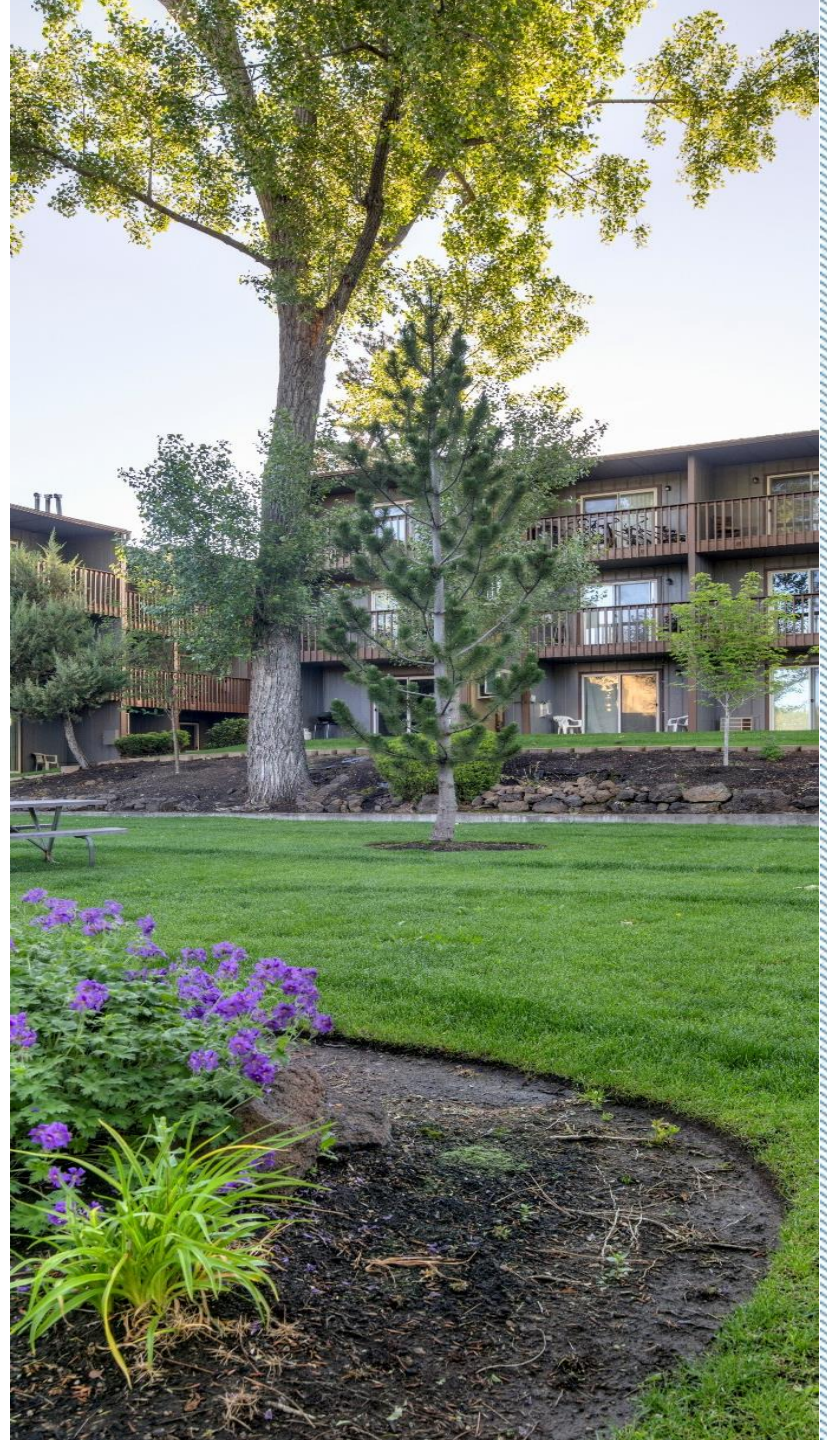
Fall Trade Ally Forum

Agenda

- 2019 Measure Updates
- 2019 Forms Redesign
- New Offerings
- Multifamily Market Analysis

What Qualifies as a Multifamily Property?

- Duplex, triplex, fourplexes
- Apartments
- Condos and townhomes
- Affordable housing
- Assisted living
- Campus living



2019 Measure Changes

2019 Incentive updates

Measure	2018 Incentive	2019 Incentive
Commercial Condensing Tank Water Heater	\$4.00 per kBtu/h	\$3.00 per kBtu/h
	91% thermal efficiency	94% thermal efficiency
Commercial Condensing Tankless Water Heaters \geq 200 kBtu/h	\$2.75 per kBtu/h	\$2.25 per kBtu/h
	94% thermal efficiency	92% thermal efficiency
Spa covers – NEW	N/A	\$100
Building Operators Certification (BOC) – NEW	N/A	\$600
Food service incentives	<i>Varies - see program representative for details</i>	

2019 Foodservice changes

New Incentives

- Single/Double Rack Ovens (gas)
- Commercial Dishwashers (gas or electric DHW)
 - Undercounter (low temp)
 - Pot, Pan and Utensil (high temp)
 - Multi-tank Conveyor (low/high temp)

Discontinued Incentives

- Commercial Ice Makers
- Griddle (gas), Convection Oven (electric) (half-size)
- Commercial Dishwasher (gas DHW, under counter, high temp)

Incentive Changes

- Combination Ovens, Convection Ovens, Fryers, Steam Cookers, Hot Food Cabinet (full-size electric)
- Commercial Dishwasher (gas or electric DHW, single tank)
- Door/Upright (low/high temp)

2019 Forms Redesign

2019 Forms Redesign

2019 Existing Multifamily Incentive Forms

Retired: Form 320P – Standard incentives	<i>Now broken out into equipment-specific forms</i>
New: Form 320HVAC – HVAC equipment	<i>Now standalone forms (previously all included in 320P)</i>
New: Form 320WH – Water Heating	
New: Form 320APP – Appliances	
Updated: Form 320WX – Weatherization	<i>Remains standalone</i>
New: Form 320A – Option to Assign Incentive Payment	<i>Now standalone form</i>
Updated: Form 320F – Food Service	<i>Incentive changes</i>

Multifamily New Offerings

Multifamily On-Bill Repayment

On-bill heat pump offerings now available for owner-occupied multifamily residences!

- All building types:
 - Ductless heat pumps
- Duplex, triplex, fourplex and side-by-side structures only:
 - Ducted heat pumps
 - Heat pump advanced controls
- Available to multifamily trade allies participating in on-bill refinancing
- Same process and requirements as single-family (Form 321HP)



Savings Within Reach

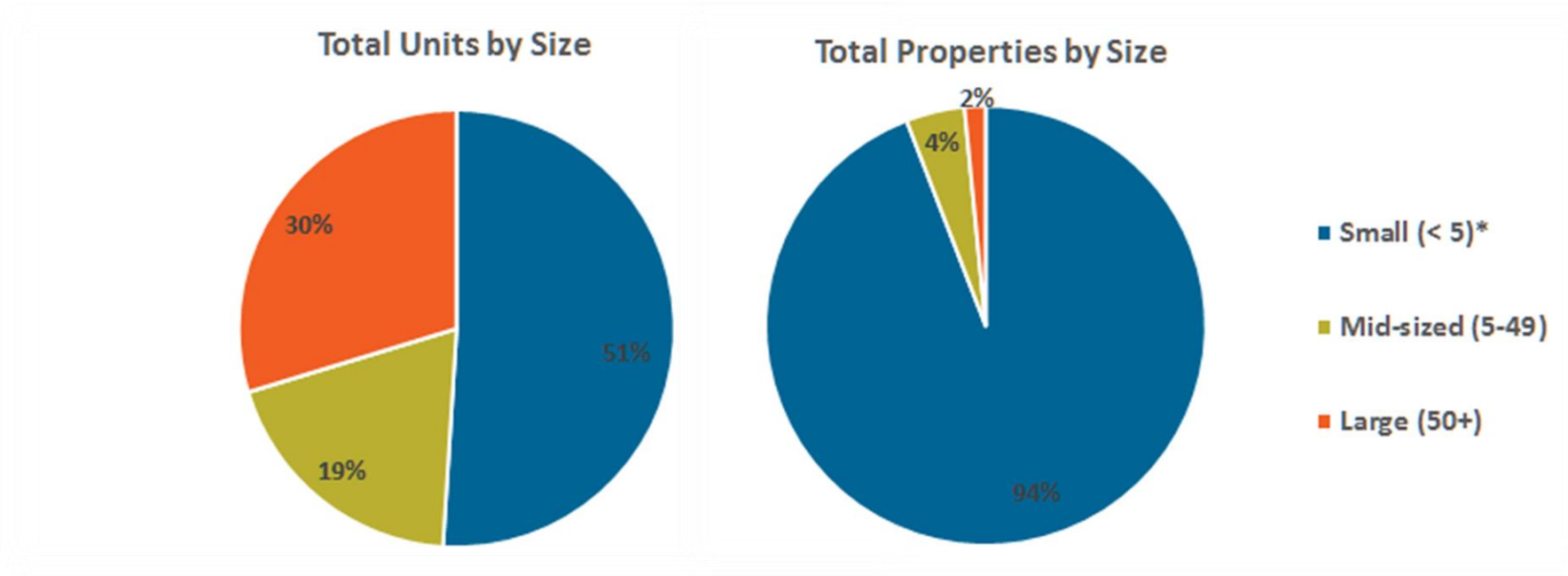
- Planned expansion of Savings Within Reach offerings to multifamily homes
- Anticipated mid-2019
- For alignment with single-family offerings, process and requirements
- Available to Savings Within Reach trade allies enrolled with Multifamily program

Multifamily Market Analysis

Study Overview

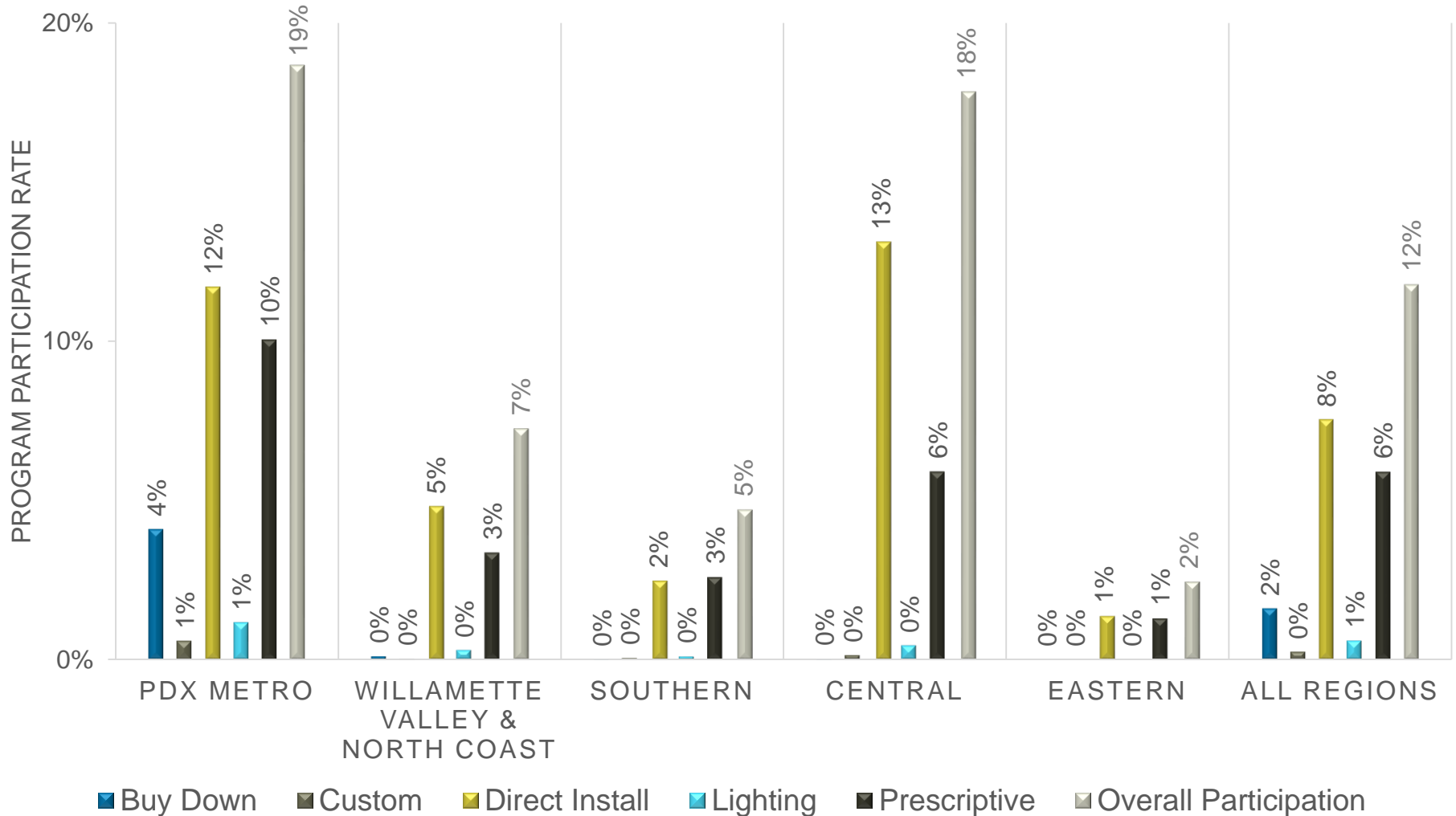
- Analysis of the existing multifamily market across regions and market segments
- Looked at program participation rates and trends
- Goals→
 - Generate actionable insights into Multifamily customer uptake of Energy Trust offerings across region, market sectors and property sizes
 - Support strategic marketing and outreach

Central Oregon Multifamily Market

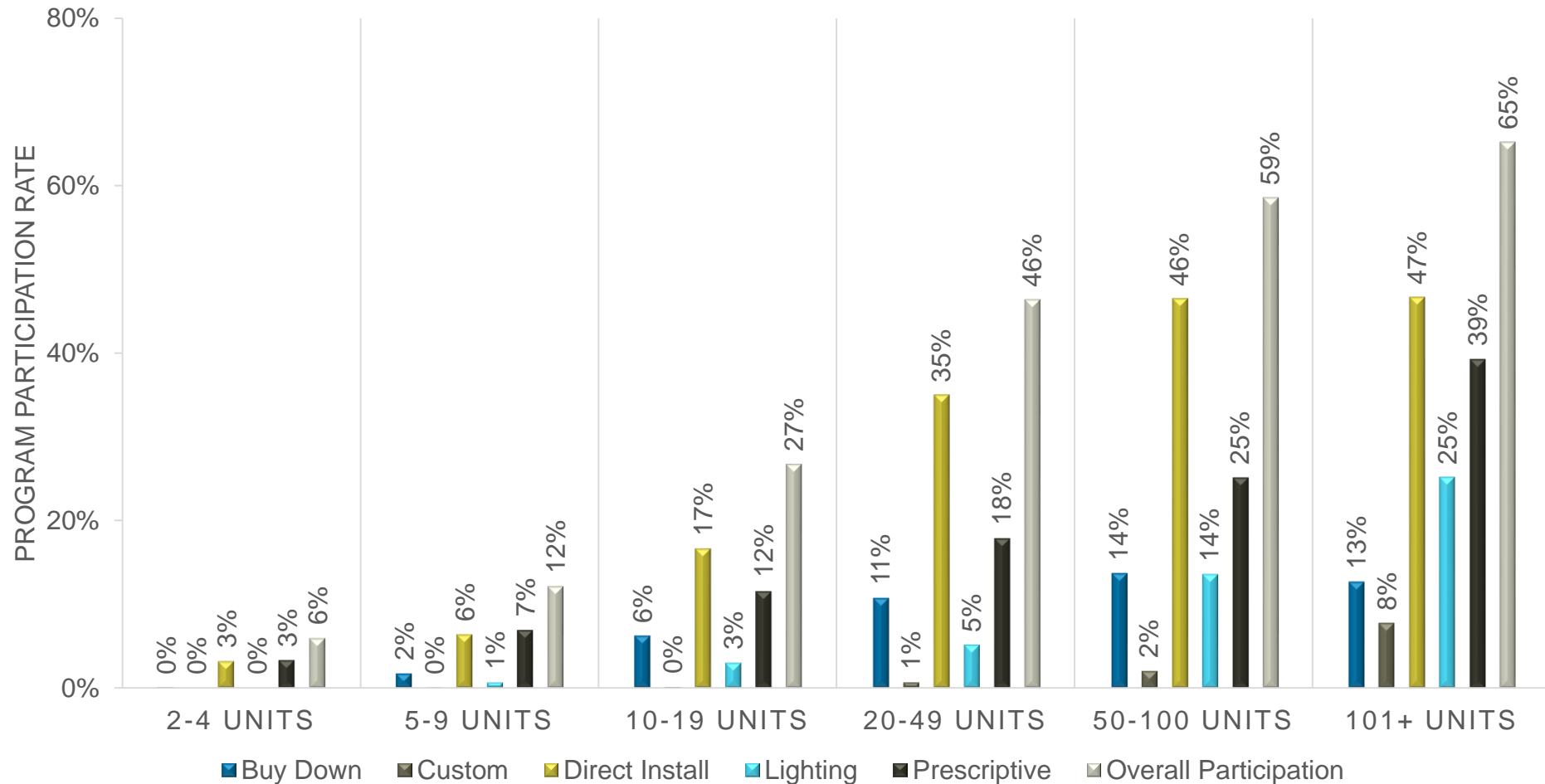


Property Size	Total Dwelling Units	Total Properties
Small (<5)	7,144	2,739
Mid-sized (5-49)	2,704	125
Large (50+)	4,158	45
TOTAL	14,006	2,909

Program participation by region



Program participation by property size



Key takeaways

- Central Oregon 2nd highest participation of any region – 18% across all program tracks
- Majority of multifamily properties in Central Oregon are duplex/triplex/fourplexes
- Large opportunity for prescriptive projects
 - Most common measures are HVAC, windows, appliances
 - Opportunity for water heating, insulation and lighting
- Overall, statewide participation of 12% indicates lots of opportunity across all property types and market sectors
- Need for tailored outreach strategies for different customers, regions and property types

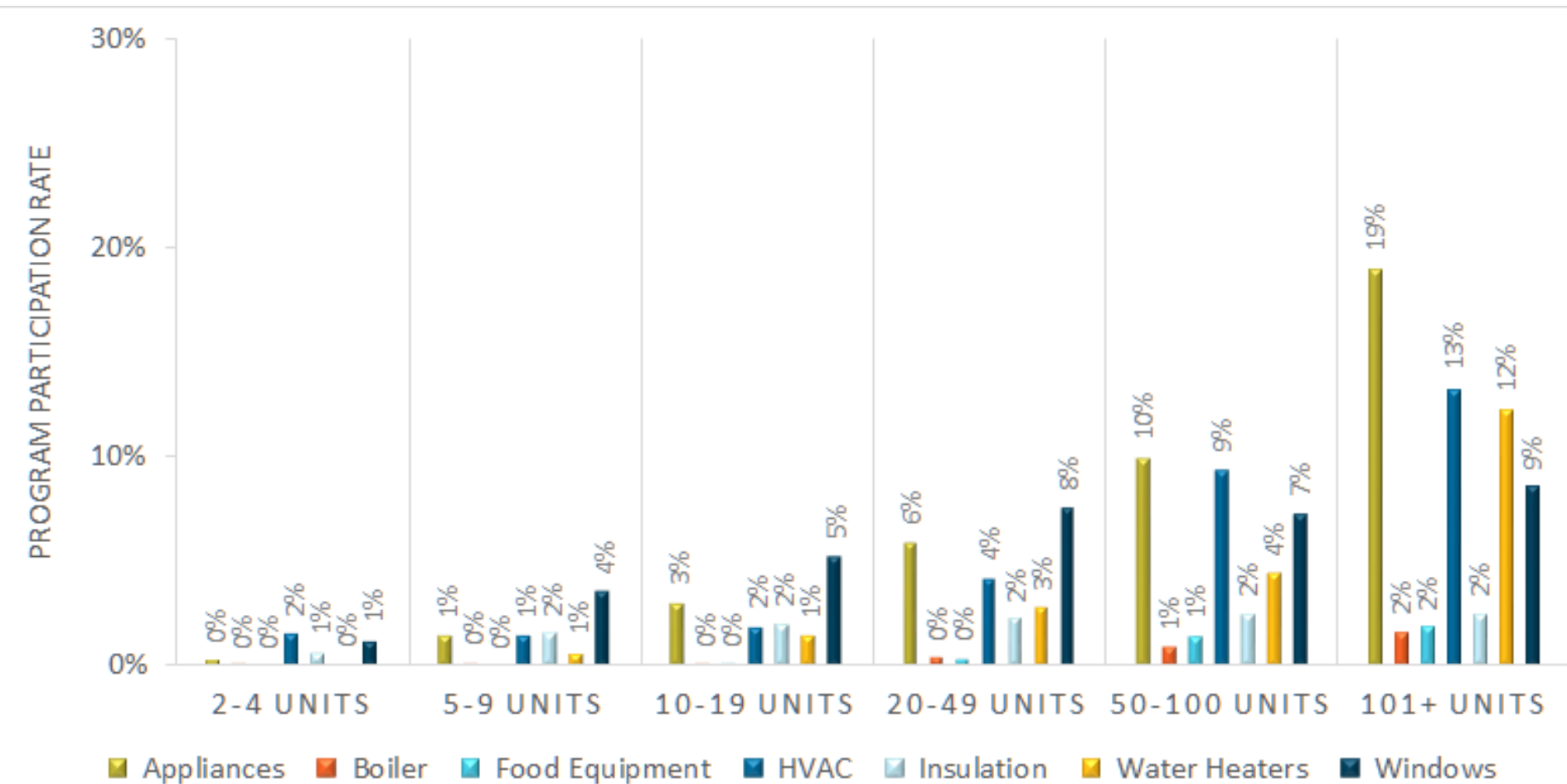


Thank You

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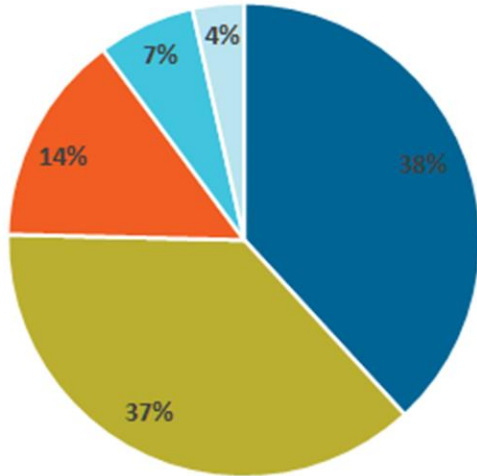
APPENDIX

Program participation by Property Size and Technology

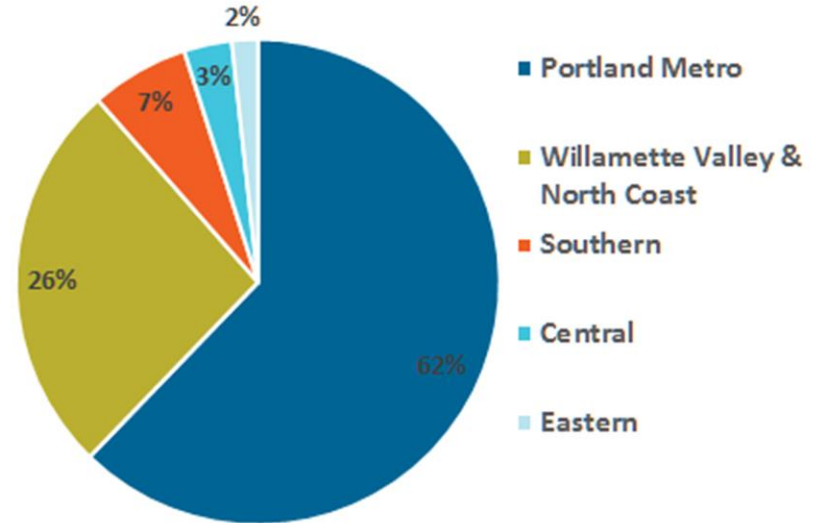


Multifamily Market Overview by Region

Eligible Multifamily Properties by Region



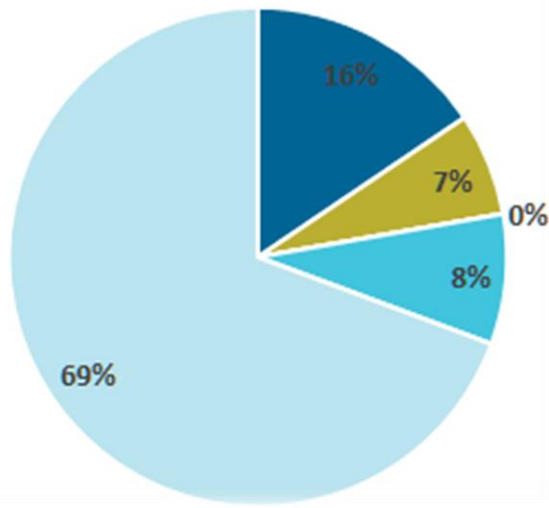
Eligible Multifamily Dwelling Units by Region



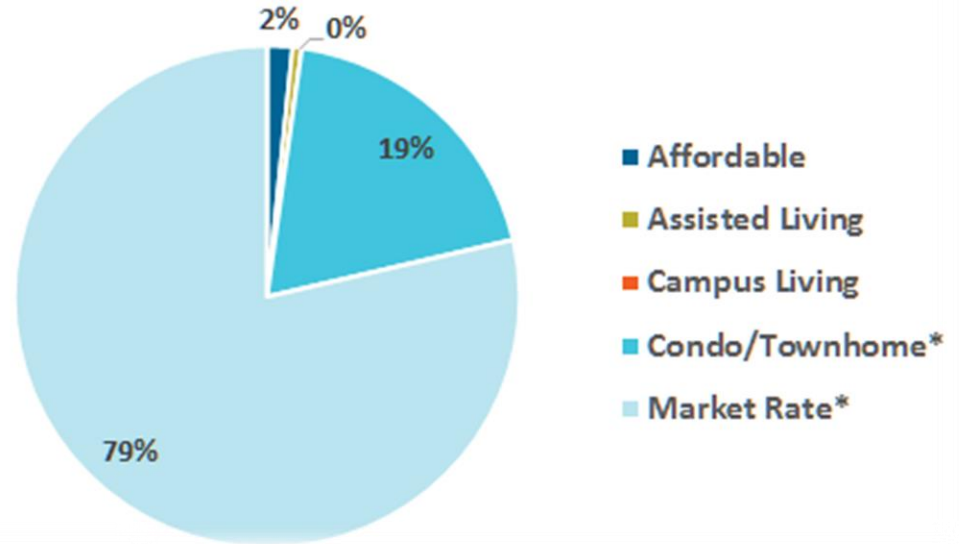
Region	Total Properties	Total Units	Average Units/Property
Portland Metro	16,680	272,836	16.4
Willamette Valley & North Coast	16,281	115,081	7.1
Southern	6,315	28,762	4.6
Central	2,909	14,006	4.8
Eastern	1,543	7,645	5.0
TOTAL	43,728	438,330	10.0

Central Oregon Multifamily Market

Total Units by Sector



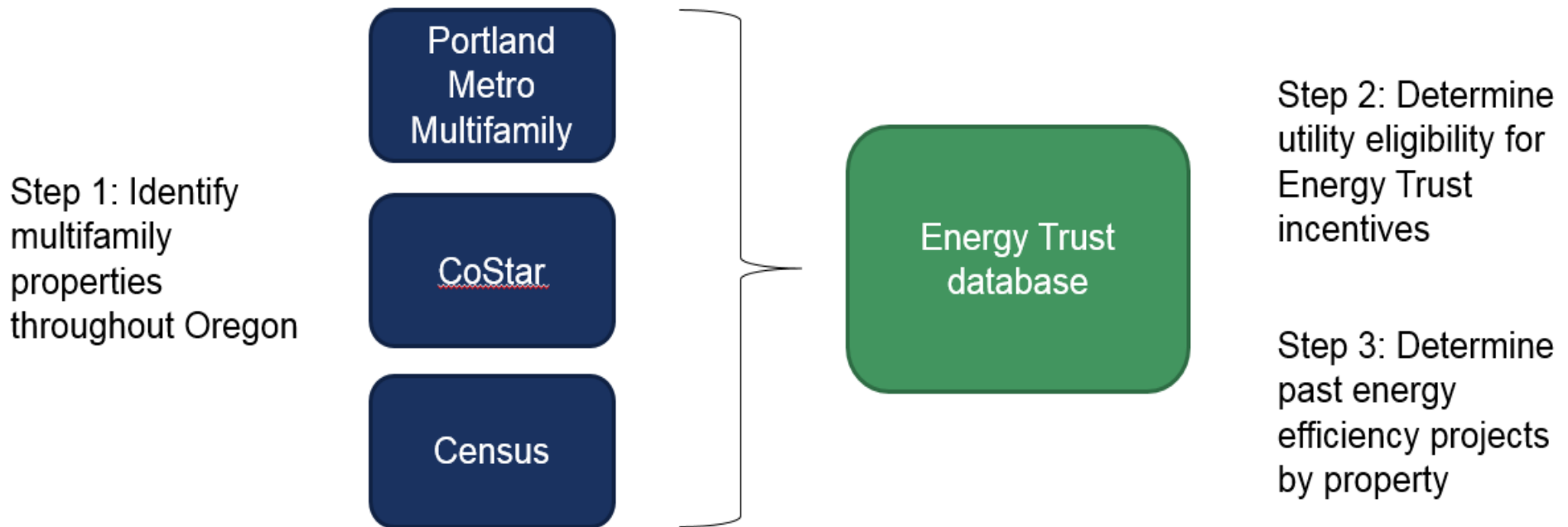
Total Properties by Sector



Sector	Total Dwelling Units	Total Properties
Affordable	2,180	47
Assisted Living	932	17
Condo/Townhome	1,182	557
Market Rate	9,712	2,288
TOTAL	14,006	2,909

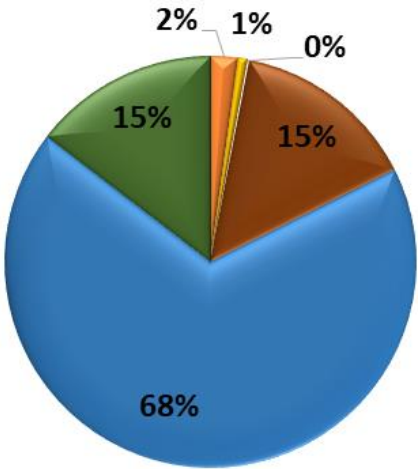
Methodology

Data: 3rd Party sources + Energy Trust database

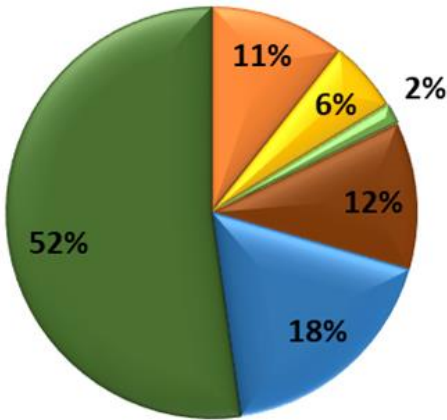


Multifamily market overview – by market sector

Eligible Multifamily Properties
by Market Sector



Eligible Multifamily Dwelling Units
by Market Sector



- Affordable
- Assisted Living
- Campus Living
- Condo/Townhome
- Market Rate (2-4 units)
- Market Rate (5+ units)

Market Sector	Portland Metro		All Other Regions		Statewide Total	
	Properties	Units	Properties	Units	Properties	Units
Affordable	572	31,168	353	15,619	925	46,787
Assisted Living	179	15,565	148	9,055	327	24,620
Campus Living	35	5,086	49	1,861	84	6,947
Condo/Townhome	1,242	39,168	5,122	11,714	6,364	50,882
Market Rate (5+ units)	4,258	156,390	2,108	72,545	6,366	228,935
Market Rate (2-4 units)	10,394	25,459	19,268	54,700	29,662	80,159
TOTAL	16,680	272,836	27,048	165,494	43,728	438,330

Program participation – by market sector & technology

