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
<table>
<thead>
<tr>
<th>Measure</th>
<th>2018 Incentive</th>
<th>2019 Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Condensing Tankless Water Heaters $\geq 200 \text{kBtu/h}$</td>
<td>$2.75 \text{ per kBtu/h}$</td>
<td>$2.25 \text{ per kBtu/h}$</td>
</tr>
<tr>
<td>Spa covers – NEW</td>
<td>N/A</td>
<td>$100$</td>
</tr>
<tr>
<td>Building Operators Certification (BOC) – NEW</td>
<td>N/A</td>
<td>$600$</td>
</tr>
<tr>
<td>Commercial Condensing Tank Water Heater</td>
<td>$4.00 \text{ per kBtu/h}$</td>
<td>$3.00 \text{ per kBtu/h}$</td>
</tr>
<tr>
<td>Food service incentives</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Spas</td>
<td>Varies - see program representative for details</td>
<td>Varies - see program representative for details</td>
</tr>
</tbody>
</table>
# 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

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

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

• All building types:
  o Ductless heat pumps

• Duplex, triplex, fourplex and side-by-side structures only:
  o Ducted heat pumps
  o 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 →
  o Generate actionable insights into Multifamily customer uptake of Energy Trust offerings across region, market sectors and property sizes
  o Support strategic marketing and outreach
Central Oregon Multifamily Market

<table>
<thead>
<tr>
<th>Property Size</th>
<th>Total Dwelling Units</th>
<th>Total Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (&lt;5)</td>
<td>7,144</td>
<td>2,739</td>
</tr>
<tr>
<td>Mid-sized (5-49)</td>
<td>2,704</td>
<td>125</td>
</tr>
<tr>
<td>Large (50+)</td>
<td>4,158</td>
<td>45</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>14,006</strong></td>
<td><strong>2,909</strong></td>
</tr>
</tbody>
</table>
Program participation by region

- **PDX METRO**
  - Overall Participation: 19%
  - Prescriptive: 1%
  - Custom: 4%
  - Buy Down: 12%
  - Direct Install: 1%

- **WILLAMETTE VALLEY & NORTH COAST**
  - Overall Participation: 10%
  - Prescriptive: 5%
  - Custom: 1%
  - Buy Down: 12%
  - Direct Install: 1%

- **SOUTHERN**
  - Overall Participation: 7%
  - Prescriptive: 2%
  - Custom: 3%
  - Buy Down: 5%
  - Direct Install: 0%

- **CENTRAL**
  - Overall Participation: 18%
  - Prescriptive: 13%
  - Custom: 6%
  - Buy Down: 0%
  - Direct Install: 0%

- **EASTERN**
  - Overall Participation: 8%
  - Prescriptive: 2%
  - Custom: 1%
  - Buy Down: 2%
  - Direct Install: 0%

- **ALL REGIONS**
  - Overall Participation: 12%
  - Prescriptive: 1%
  - Custom: 6%
  - Buy Down: 2%
  - Direct Install: 1%
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

Kate Wellington
Multifamily Program Manager
kate.wellington@energytrust.org
APPENDIX
Program participation by Property Size and Technology
### Multifamily Market Overview by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Properties</th>
<th>Total Units</th>
<th>Average Units/Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland Metro</td>
<td>16,680</td>
<td>272,836</td>
<td>16.4</td>
</tr>
<tr>
<td>Willamette Valley &amp; North Cost</td>
<td>16,281</td>
<td>115,081</td>
<td>7.1</td>
</tr>
<tr>
<td>Southern</td>
<td>6,315</td>
<td>28,762</td>
<td>4.6</td>
</tr>
<tr>
<td>Central</td>
<td>2,909</td>
<td>14,006</td>
<td>4.8</td>
</tr>
<tr>
<td>Eastern</td>
<td>1,543</td>
<td>7,645</td>
<td>5.0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>43,728</strong></td>
<td><strong>438,330</strong></td>
<td><strong>10.0</strong></td>
</tr>
</tbody>
</table>
### Central Oregon Multifamily Market

<table>
<thead>
<tr>
<th>Sector</th>
<th>Total Dwelling Units</th>
<th>Total Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable</td>
<td>2,180</td>
<td>47</td>
</tr>
<tr>
<td>Assisted Living</td>
<td>932</td>
<td>17</td>
</tr>
<tr>
<td>Condo/Townhome</td>
<td>1,182</td>
<td>557</td>
</tr>
<tr>
<td>Market Rate</td>
<td>9,712</td>
<td>2,288</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>14,006</strong></td>
<td><strong>2,909</strong></td>
</tr>
</tbody>
</table>

**Total Units by Sector**
- Affordable: 16%
- Assisted Living: 7%
- Condo/Townhome: 8%
- Market Rate: 69%

**Total Properties by Sector**
- Affordable: 2%
- Assisted Living: 0%
- Condo/Townhome: 19%
- Market Rate: 79%
Methodology

Data: 3rd Party sources + Energy Trust database

Step 1: Identify multifamily properties throughout Oregon

- Portland Metro Multifamily
- CoStar
- Census

Step 2: Determine utility eligibility for Energy Trust incentives

Step 3: Determine past energy efficiency projects by property
Multifamily market overview – by market sector

<table>
<thead>
<tr>
<th>Market Sector</th>
<th>Portland Metro</th>
<th>All Other Regions</th>
<th>Statewide Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Properties</td>
<td>Units</td>
<td>Properties</td>
</tr>
<tr>
<td>Affordable</td>
<td>572</td>
<td>31,168</td>
<td>353</td>
</tr>
<tr>
<td>Assisted Living</td>
<td>179</td>
<td>15,565</td>
<td>148</td>
</tr>
<tr>
<td>Campus Living</td>
<td>35</td>
<td>5,086</td>
<td>49</td>
</tr>
<tr>
<td>Condo/Townhome</td>
<td>1,242</td>
<td>39,168</td>
<td>5,122</td>
</tr>
<tr>
<td>Market Rate (5+ units)</td>
<td>4,258</td>
<td>156,390</td>
<td>2,108</td>
</tr>
<tr>
<td>Market Rate (2-4 units)</td>
<td>10,394</td>
<td>25,459</td>
<td>19,268</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>16,680</strong></td>
<td><strong>272,836</strong></td>
<td><strong>27,048</strong></td>
</tr>
</tbody>
</table>
Program participation – by market sector & technology