



Existing Multifamily Program Updates

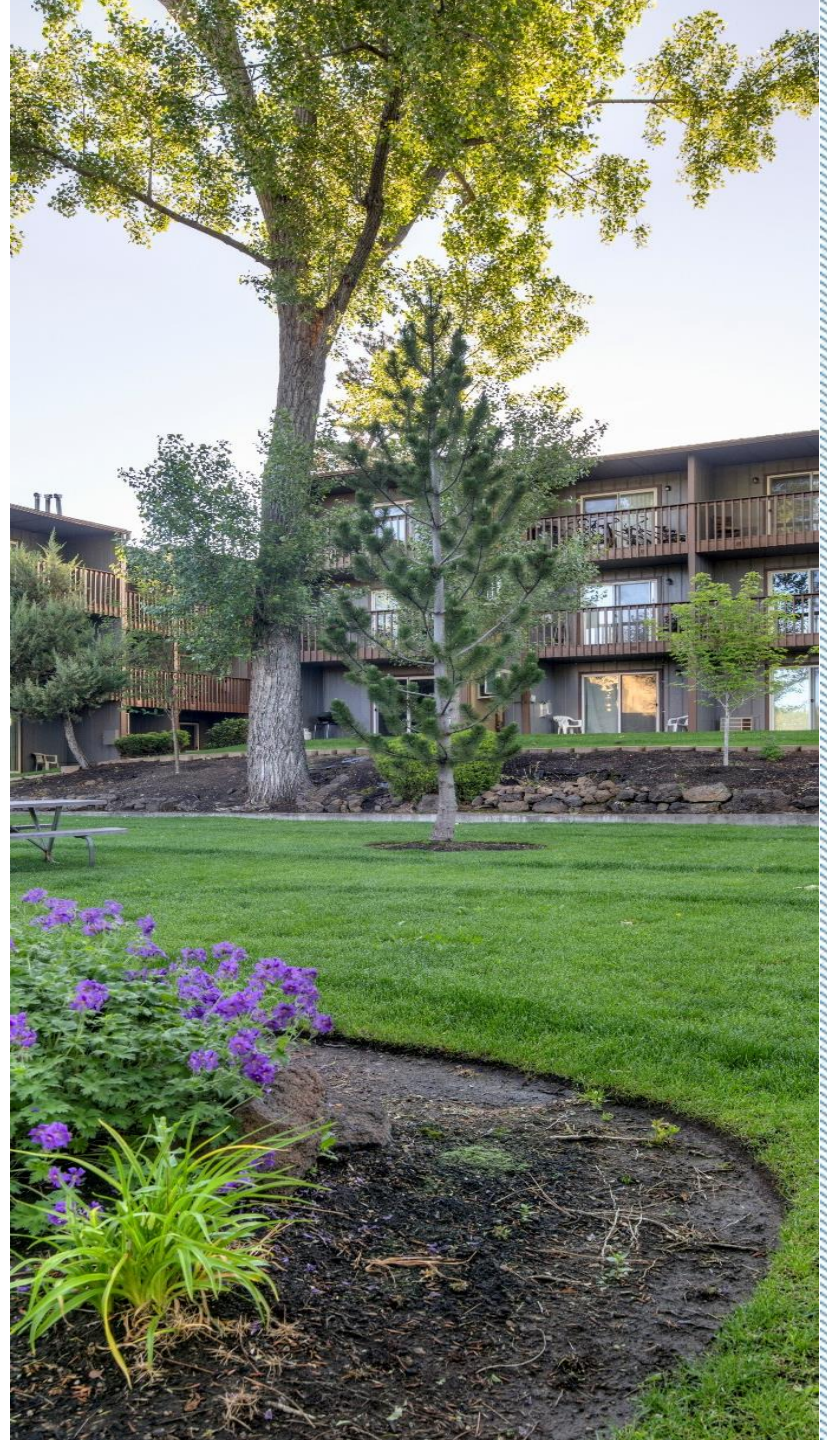
Fall Trade Ally Forum

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

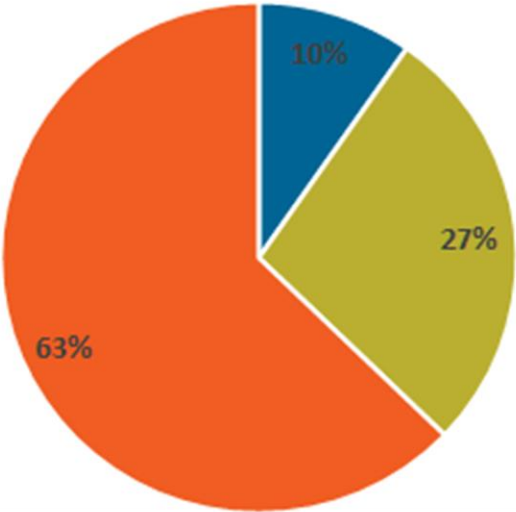
Multifamily Market Analysis

Study Overview

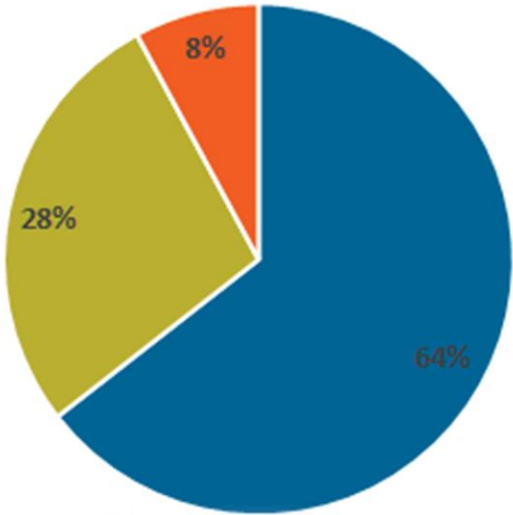
- Analysis of the existing multifamily market across regions and market segments
- Looked at program participation rates and trends
- Goals→
 - Generate actionable insights into Multifamily customer uptake of Energy Trust offerings across region, market sectors and property sizes
 - Support strategic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

Portland Metro Multifamily Market

Total Units by Size



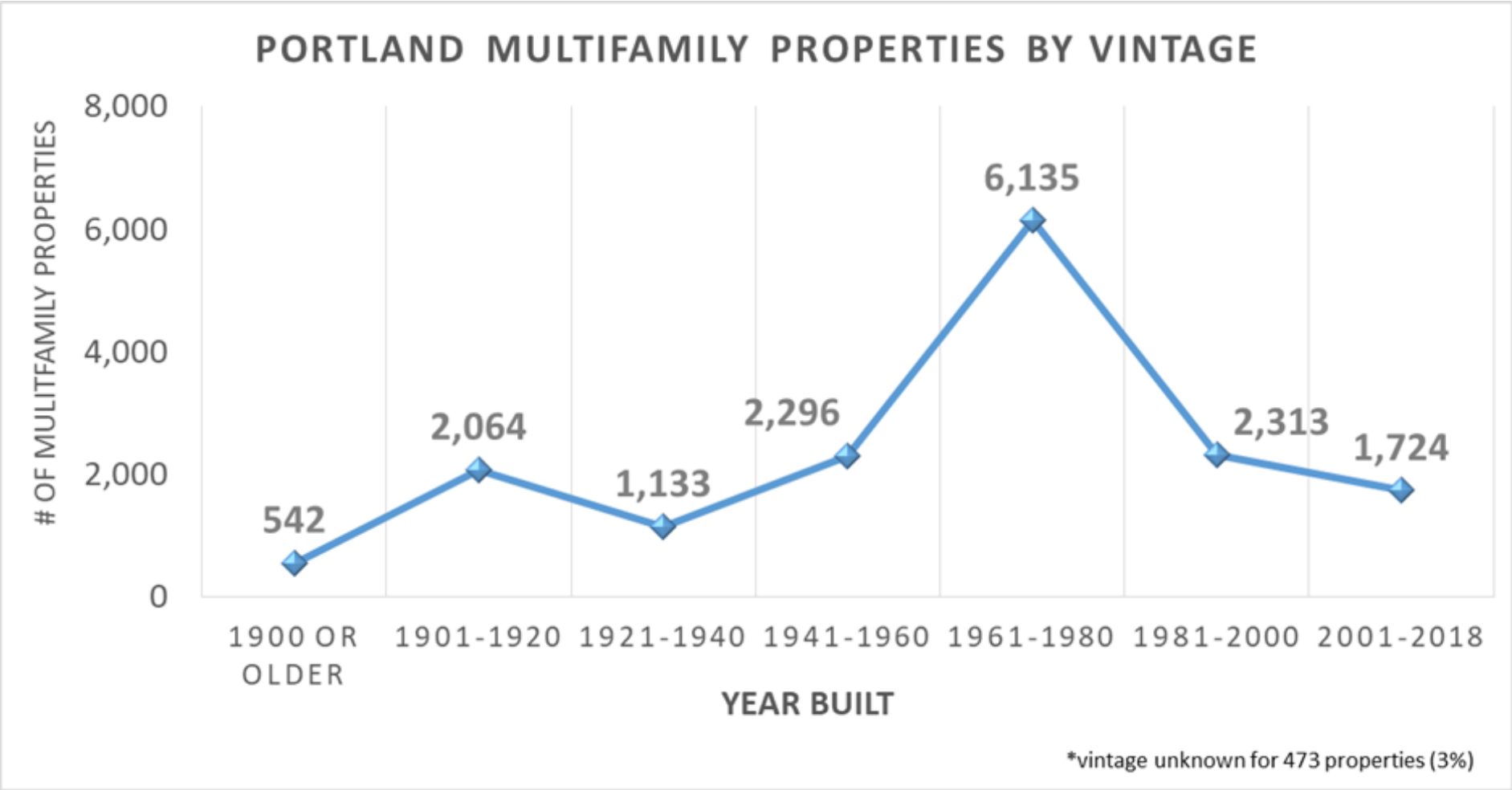
Total Properties by Size



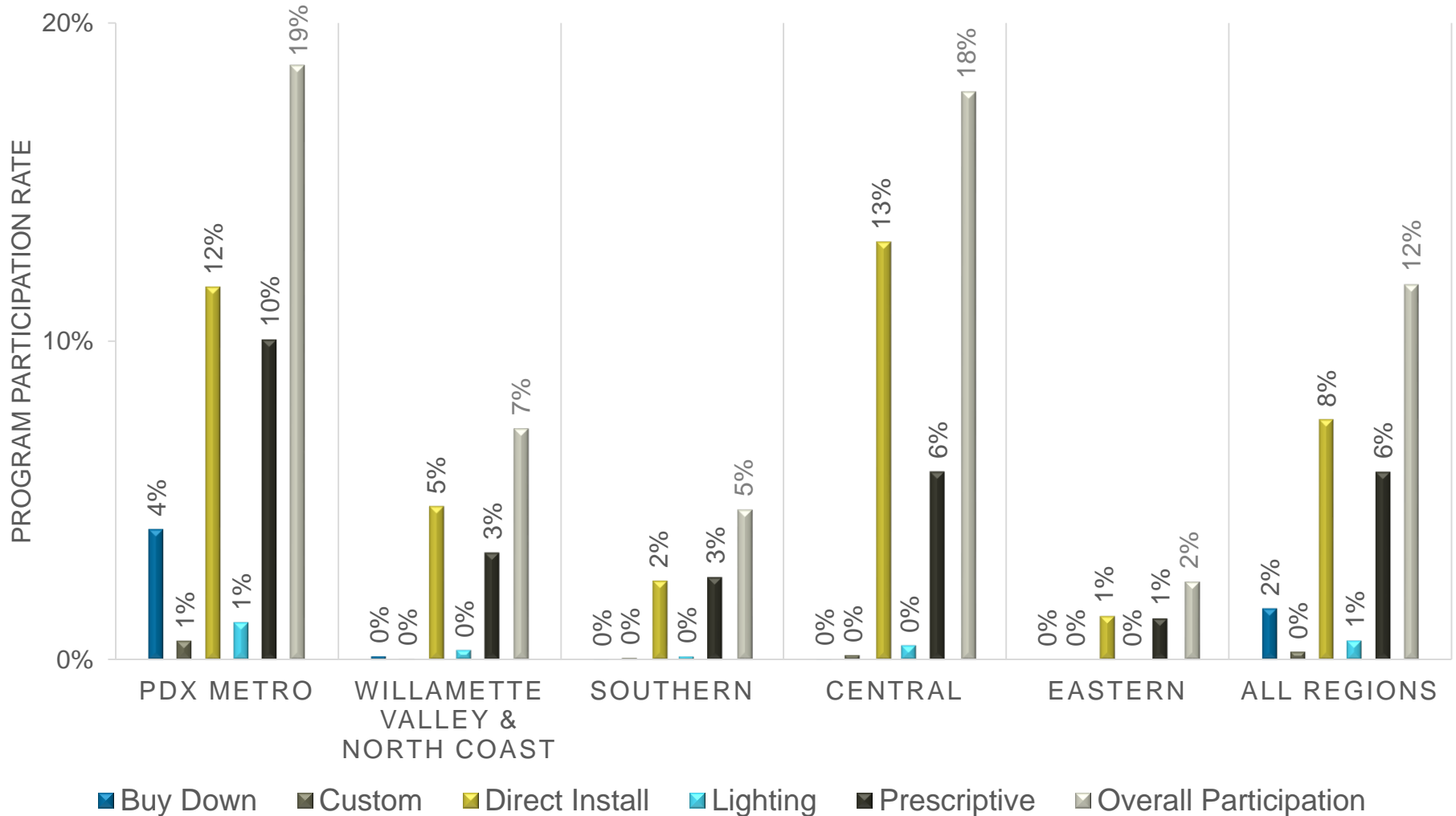
- Small (< 5)
- Mid-sized (5-49)
- Large (50+)

Property Size	Total Dwelling Units	Total Properties
Small (2-4 units)	26,526	10,756
Mid-sized (5-49)	74,976	4,602
Large (50+)	171,334	1,322
TOTAL	272,836	16,680

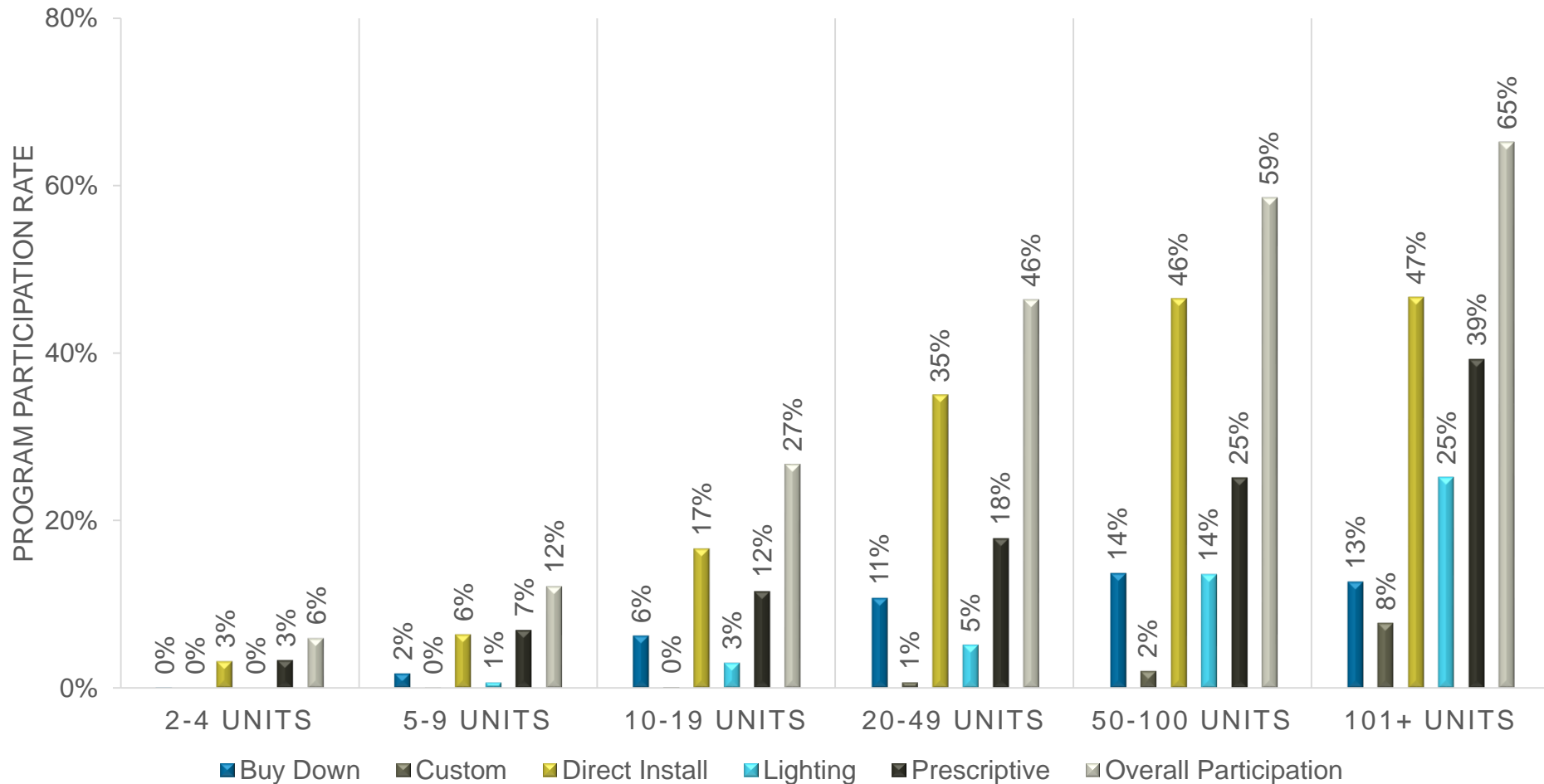
Multifamily Market Overview by Vintage



Program participation by region



Program participation by property size



Key Takeaways

- Portland metro has highest participation of any region – nearly 20%
- Majority of larger properties have been served
- Areas of opportunity:
 - Duplex, triplex and fourplexes (majority of buildings)
 - Building stock built between 1960's – 1980's
 - Condo & townhome owners
- 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

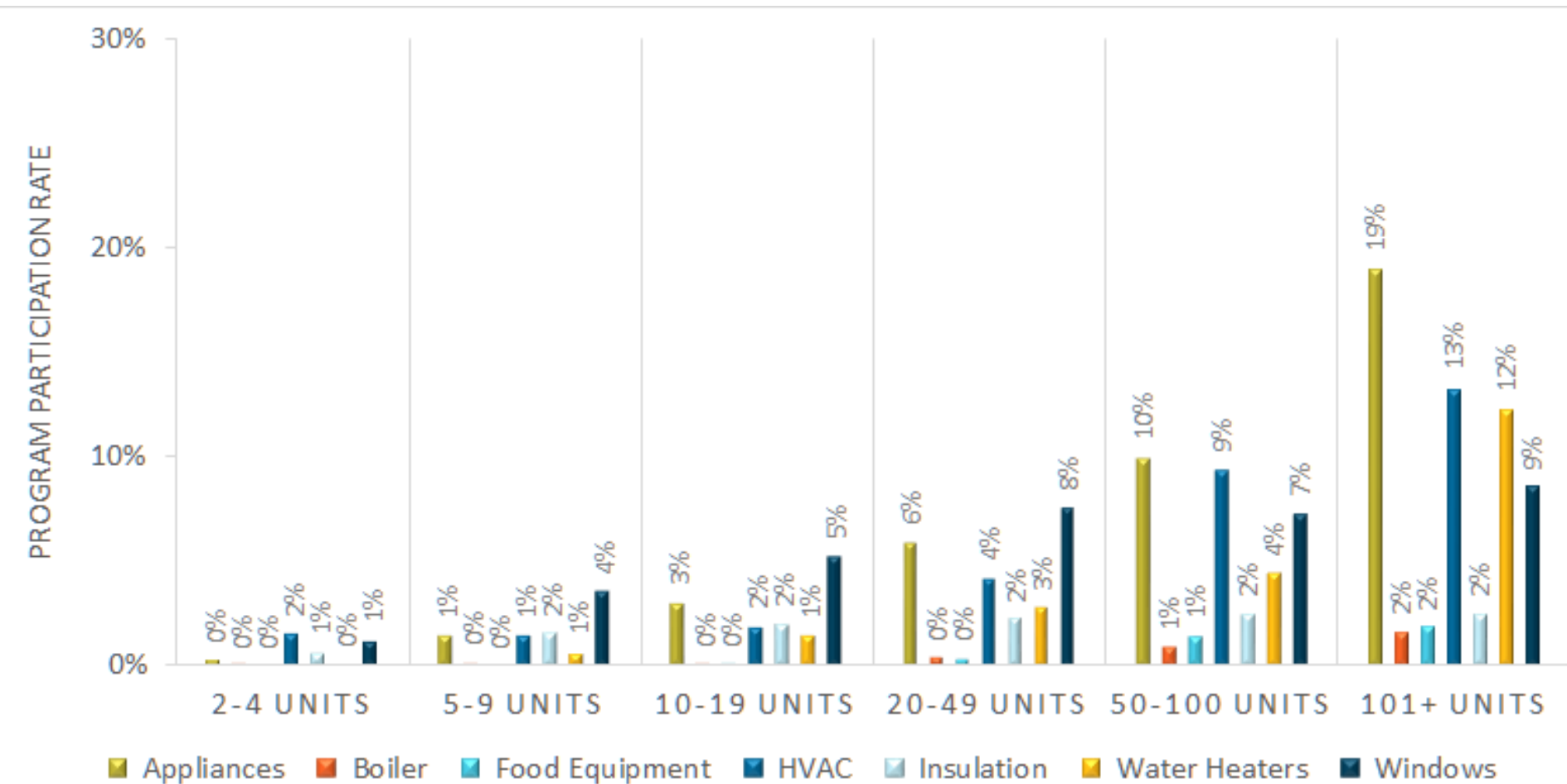


Thank You

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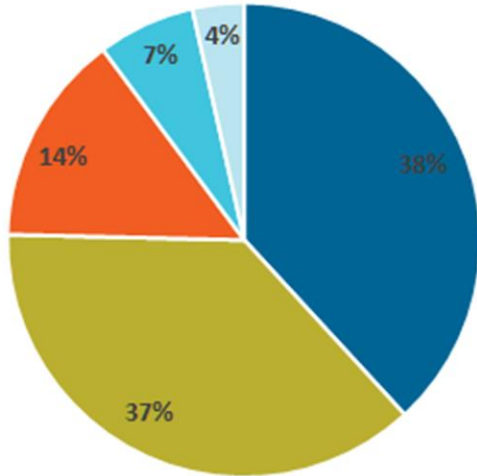
APPENDIX

Program participation by Property Size and Technology

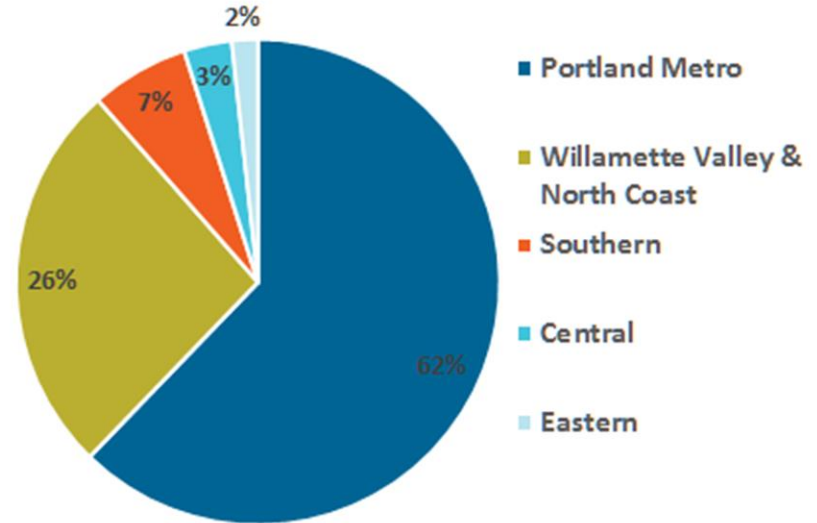


Multifamily Market Overview by Region

Eligible Multifamily Properties by Region

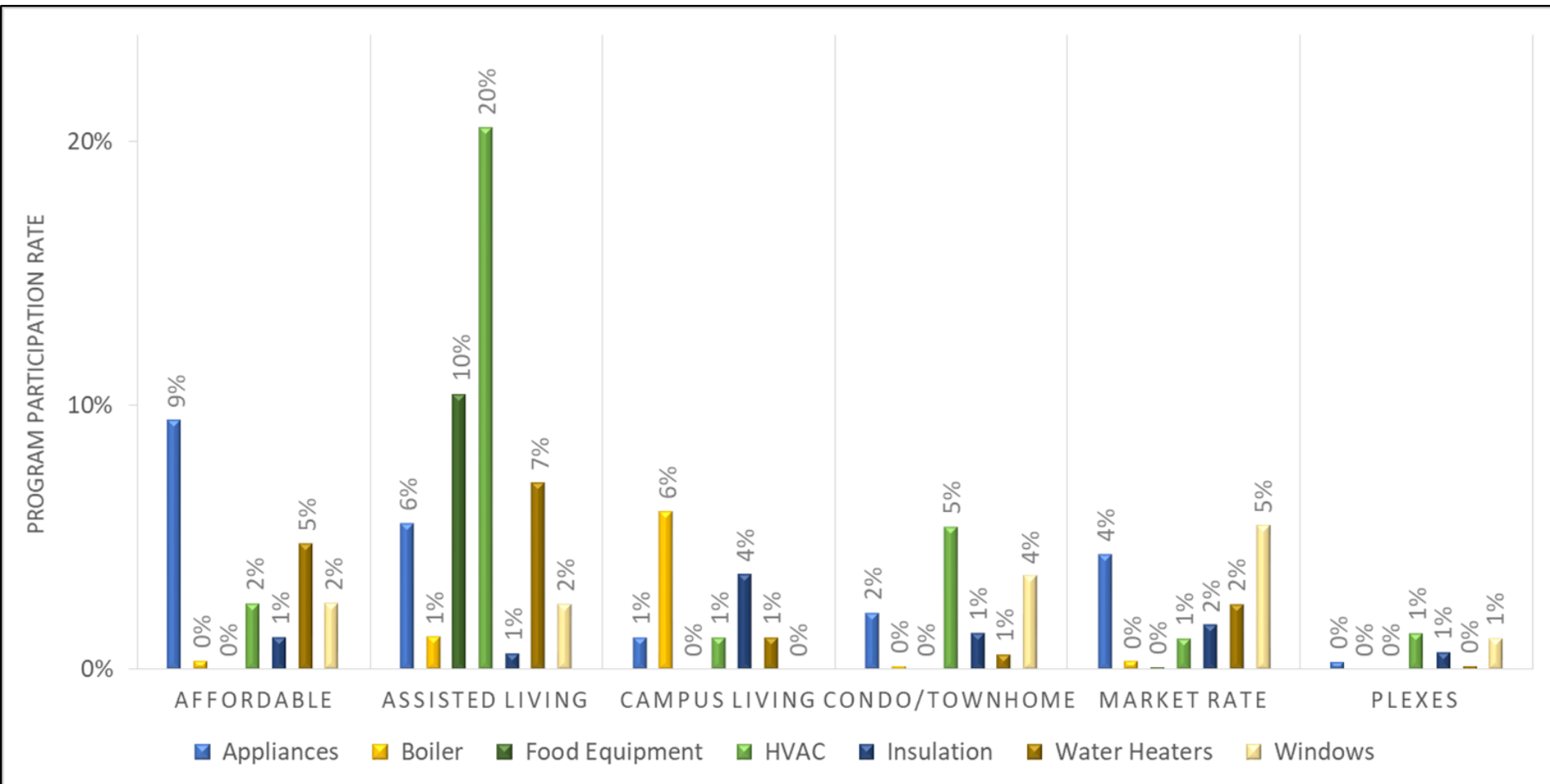


Eligible Multifamily Dwelling Units by Region



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

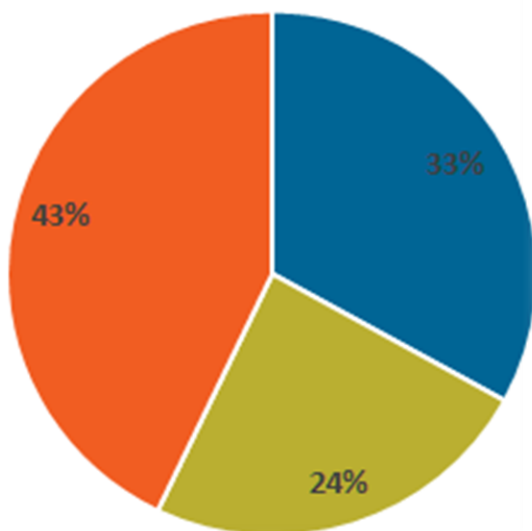
Program participation – by market sector & technology



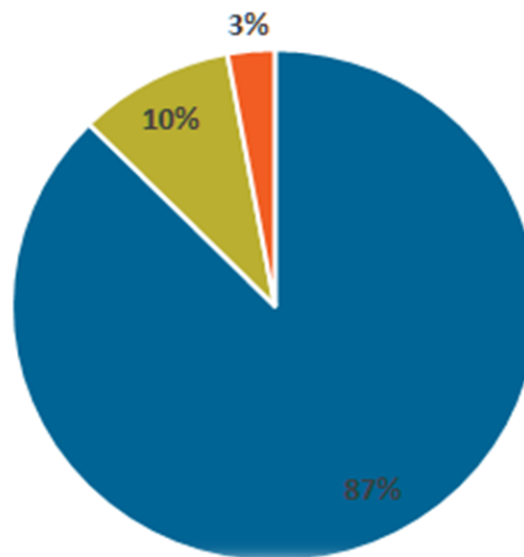
Willamette Valley & North Coast

Willamette Valley & North Coast multifamily market

Total Units by Size



Total Properties by Size

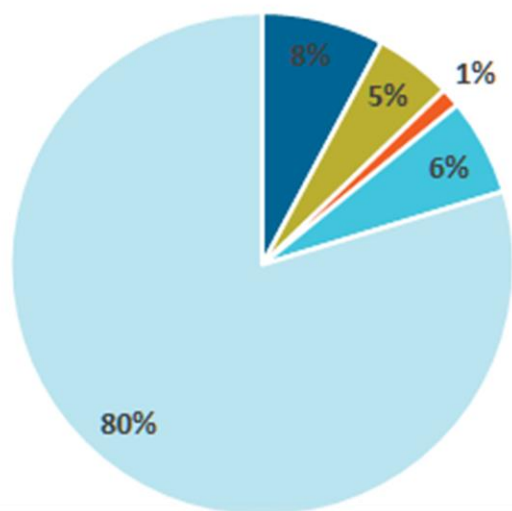


- Small (< 5)*
- Mid-sized (5-49)
- Large (50+)

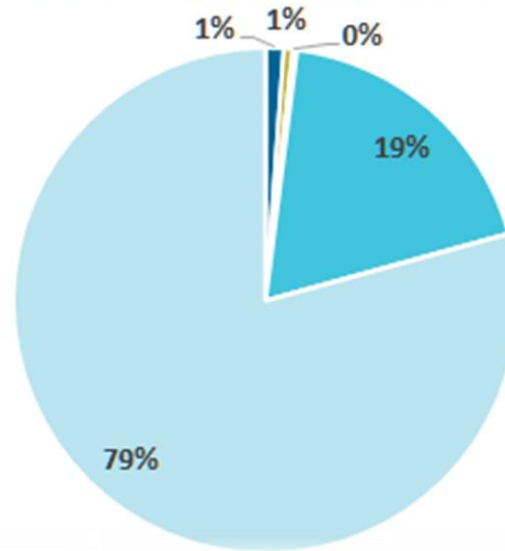
Property Size Group	Total Units	Total Properties
Small (<5)	37,997	14,253
Mid-sized (5-49)	27,728	1,558
Large (50+)	49,356	470
TOTAL	115,081	16,281

Willamette Valley & North Coast multifamily market

Total Units by Sector



Total Properties by Sector



- Affordable
- Assisted Living
- Campus Living
- Condo/Townhome*
- Market Rate*

Sector	Total Units	Total Properties
Affordable	9,022	188
Assisted Living	5,737	92
Campus Living	1,441	45
Condo/Townhome	7,162	3,051
Market Rate	91,719	12,905
TOTAL	115,081	16,281