MF HERCC Convening

OCTOBER 30, 2018 - STOPWASTE

AGENDA

- 1:00 Welcome, Introductions
- 1:15 EnergyPro Lite
- 1:45 Benchmarking
- 2:45 Break
- 3:00 Financing
- 4:15 Next Steps
Multifamily HERCC

- Industry Collaborative since 2009
- 2013 Original Report and 2015 Update
- Audit & Combustion Appliance Safety Protocols
  - Field Data Collection Form, EnergyPro Lite Software, Tracking & Benchmarking

EnergyPro Lite (LCAT)

DEVELOPMENT UPDATE
FUTURE USE CASES AND MAINTENANCE
EPL History/Overview

- EPL currently being used by BAMBE/LIWP
- Intent to make available for other programs
- Assessment of 3 tools
  - EPL, EZ Retrofit, Asset Score

Development Update

  - Internalizing external calculations
  - DHW: Central HPWH, demographics-based usage assumptions
- Future updates
  - Owner/manager-facing report
  - Outputs: CSV for SEED, Building XML
  - Electrification/fuel-switching, existing/proposed renewable energy systems
- Potential
  - Cost Wizard, estimated or actual
  - TOU pricing
EPL Use Cases

1. Incentive Programs
2. Market-based Applications
3. Local Government Ordinances

Future Use Cases and Maintenance

- **Maintaining credibility of savings estimates**
  - Ensuring consistent usage and inputs
- **Training and support**
- **Updates and maintenance**
Benchmarking

CURRENT ISSUES
PROPERTY OWNER/MANAGER EDUCATIONAL MATERIALS

Early Compliance Benchmarking TA

- **Building Attributes Variety**
  - Climate Zones
  - System Types
  - Building Vintage, # of Stories
  - Size (focus on 50K+ sq. ft.)

- **Completed EE projects (BayREN & LIWP)**
  - 12 months of data post-upgrade for validation
  - Projects ranging from 2015 to 2018
How It Works

1. Create Portfolio Manager profile (~1 hour per property)
2. Request aggregated tenant data using PG&E benchmarking portal (1-5 hours per property)
3. PG&E “standard” data request for common area meters (1-5 hours per property)
4. Offline analysis (2-6+ hours per property)

PG&E Portal

- Meter “Mapping” Updates
  - Must enter service address exactly as it appears on bills (1-20+ service addresses per property)
  - Usability improved by PG&E allowing meters to be “un-mapped” via email
  - No longer limited to 50 meters at a time
PG&E Processes

- **Linking PG&E Portal to Portfolio Manager**
  - Use custom Building ID and User ID generated by PG&E portal

Data Requests from Other Utilities

- **SoCal Gas**
  - Does not allow user to self-select meters
  - Difficult to navigate for properties with multiple service addresses

- **SCE**
  - Can self-select meters, but searching for meters under multiple service addresses (i.e., campus setting) is less flexible/fluid than PG&E

- **TID (Turlock Irrigation District)**
  - Initiated via email
  - Data provided via email
Common Issues with Vetting Data

**Ongoing Issues**
- Difficult to confirm metering locations
  - Common area versus aggregated tenant
  - Especially challenging in campus settings
- Qualitative info on equipment/building changes
  - O&M issues, occupancy changes, decommissioned equipment brought back online
- Inconsistent length of historic data
- Lack of bill back-ups to cross-check questionable data

**New Issues**
- VNEM (Virtual Net Energy Metering)
  - Effect on aggregated tenant data is largely unknown, should be watched for potential issues
- Unit turnover causing taper of historic data
  - Historic data only reported for currently active customer accounts

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High Unit Turnover = Faulty Data

**Location:** Sunnyvale, CA  
**Sq. ft.:** 210,936  
**Units:** 304

Aggregated data over 3 years at a property with high turnover
Historic Taper

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Potential Solution to Missing Historic Data

- SDGE
  - Provides # of reporting meters per month
  - Does not correct the data quality issue per se, but transparency allows user to calculate average consumption based on # of reporting meters
Potential Solution to Missing Historic Data

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Educational Materials

- Property owner/manager-facing “Why Benchmark?”
- CEC MF-specific benchmarking docs available December 2018
  - Fact sheets, FAQ, Guide
Discussion, roundtable questions

- Unit turnover and historic taper – how to solve these issues given IOUs have unique portals?
- How many other MF programs are offering BM services, and is there an opportunity for common data collection protocols?
- How do we make the ESPM scores more relevant/meaningful for MF, especially mixed-use buildings?
  - Tenant and floor/area aggregation

Financing

PROGRAM AND PRODUCT PRESENTATIONS
ROUNDTABLE DISCUSSION
Programs/Products

1. BayREN Water Bill Savings Program (Frontier)
2. BayREN MF Financing Services (StopWaste)
3. On-Bill Financing (PG&E/TRC/SCG)
4. Affordable Multifamily Energy Efficiency Financing Pilot (CAEATFA)
5. National MF Financing Landscape (NRDC)

National MF Financing Landscape

- Phil Henderson
  - NRDC, Senior Financial Policy Specialist
Discussion

1. Have you considered ways to streamline the underwriting process to minimize transaction costs?
2. What requirements does your program have for estimating project energy savings? How have these requirements been received by the market?
3. How is your program marketed?
4. Can your program be used to help cover construction costs?

Next Steps
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