

2013-2014 Energy Efficiency Programs Multi-Family Home Tune-Up Program Implementation Plan

1. **Program Name:** Multi-Family Home Tune-Up
Program ID: SCG3761
Program Type: Third Party

2. Projected Program Budget Table

Table 1: Total Projected Program Budget by Category

Program #	Main/Sub Program Name	Administrative Amount	Marketing Amount	Direct Implementation Amount	Incentive Amount	Total Program Budget Amount
	SoCalGas Third Party Programs					
3761	3P-MF Home Tune-Up	\$0	\$0	\$881,148	\$1,158,852	\$2,040,000
3761u	3P-MF Home Tune-Up (Utility)	\$37,405	\$7,661	\$56,247	\$0	\$101,313
	TOTAL:	\$37,405	\$7,661	\$937,395	\$1,158,852	\$2,141,314

Note: SCG continues to negotiate the final contract with the third party vendor. As a result of final contract negotiations, the budget allocation into the budget subcategories may vary.

3. Projected Program Gross Impacts Table

Table 2: Total Projected Program Savings by Subprogram

Program #	Main/Sub Program Name	2013-2014 Gross kW Savings	2013-2014 Gross kWh Savings	2013-2014 Gross Therm Savings
	SoCalGas Third Party Programs			
3761	3P-MF Home Tune-Up	0	0	582,859
	TOTAL:	0	0	582,859

Note: The therm savings are estimated based on contract negotiations with the third party vendor. The projected savings may change as a result of final contract negotiations.

4. Program Description

a) Describe program

Through the Multi-Family Home Tune-up Program, Contractor will help deliver energy savings to multifamily customers located in Orange, San Bernardino, Riverside, and parts of San Luis Obispo, Fresno, Kern, Kings, Tulare and Imperial counties during the –2013 - 2014 program period.

Since there are two contractors implementing similar programs for multifamily customers in SoCalGas territory, each contractor has been assigned specific counties in which to market their program.

To differentiate this program from other direct install programs, this program, in addition to the measures listed, will provide valuable efficiency education directly to both multifamily property owners and tenants. Through this program, Contractor will:

- Perform building audits at multifamily properties, identifying a comprehensive list of gas, electricity and water savings opportunities available in each property and delivering education and training about the benefits of efficiency and proper maintenance to these property owners and managers

**2013-2014 Energy Efficiency Programs
Multi-Family Home Tune-Up
Program Implementation Plan**

- Directly install high-efficiency measures in multifamily units during the Program’s two-year extension.
- Deliver efficiency education in a one-on-one setting with available multifamily tenants during the Direct Install services
- Provide SoCalGas’s Multifamily Energy Efficiency Retrofit program materials and contact information to multifamily property owners and managers, and pass warm leads of prospective properties to the SoCalGas or other appropriate utility programs as appropriate

b) List measures

The following measures will be implemented by this program:

- Low Flow Showerheads
- Bathroom/Kitchen Faucet Aerators

c) List non-incentive customer services

Through this program, Contractor will do the following:

- Perform holistic building audits at multifamily properties, identifying a comprehensive list of gas, electricity and water savings opportunities available at each property
- Deliver education and training about the benefits of energy efficiency and proper maintenance to property owners and managers
- Deliver efficiency education in a one-on-one setting with available multifamily tenants during the direct install services
- Provide SoCalGas’s Multifamily Energy Efficiency Retrofit Program materials and contact information to multifamily property owners and managers, as appropriate
- Provide potential customer lead opportunities for additional services to other programs, such as SoCalGas’s Multifamily Energy Efficiency Retrofit Program.

5. Program Rationale and Expected Outcome

a) Quantitative Baseline and Market Transformation Information

This section is not applicable.

b) Market Transformation Information

This section is not applicable

c) Program Design to Overcome Barriers

The barriers that have been identified in previous years are:

Barrier	Solution
The lack of consumer information about energy efficiency benefits creates reluctance on behalf of decision-makers.	The Program uses an account management strategy to educate customers about energy efficiency opportunities.

**2013-2014 Energy Efficiency Programs
Multi-Family Home Tune-Up
Program Implementation Plan**

Measures are generally paid for by the property owner but benefit the tenant), split incentives (between owners/landlords and tenant	The Program overcomes the split incentive problem by providing services free of charge to end users.
Lack of financing for energy efficiency improvements	By providing measures and services free of charge to customers, the Program overcomes the lack of financing barrier
Lack of availability of high-efficiency products	IOU requires measure specification to meet high efficiency eligibility requirements
Residential	
Housing Type: Multi-family and mobile home tenants	The Program targets multi-family units and adapts its marketing approach to ensure penetration of this market.
OTHER BARRIERS	
Agreeing upon the procedures and measurement of energy saving and reliability benefits.	Extensive education and marketing will be conducted and targeted toward decision makers of multi-family properties
The models developed for assessing usage are often confusing to financiers & managers. Need to be expressed in plain English	Extensive education and marketing will be conducted and targeted toward decision makers of multi-family properties

d) Quantitative Program Targets

Table 3

Multi-Family Tune-Up	Program Target by 2013	Program Target by 2014
Low flow shower heads installed	11,000	11,000
Faucet aerators	29,820	29,820

Note: Values provided represent yearly targets.

e) Advancing Strategic Plan goals and objectives

This program supports the Strategic Plan in the following manner:

Description	Strategic Plan Sector	Strategic Plan Goal	Strategic Plan Strategy
The program performs whole-building approach audits and identifies comprehensive list of gas, electricity and water savings opportunities.	Coordination	Deliver integrated DSM options that include efficiency, demand response, energy management and self generation measures, through coordinated marketing and regulatory integration	1-3: Develop integrated DSM programs across resources, including energy, water, and transportation.
The program employs active on-site education and training of site personnel.	Marketing Education & Outreach	Establish energy efficiency education and training at all levels of California's educational	1-3: Incorporate energy efficiency and demand side energy management into

**2013-2014 Energy Efficiency Programs
Multi-Family Home Tune-Up
Program Implementation Plan**

Description	Strategic Plan Sector	Strategic Plan Goal	Strategic Plan Strategy
		system	traditional contractor and technician training, such as for plumbers and electricians, and expand training resources to produce target numbers of trained workers

6. Program Implementation

a) Statewide IOU Coordination

- i.** Program name
- ii.** Program delivery mechanisms
- iii.** Incentive levels
- iv.** Marketing and outreach plans, e.g. research, target audience, collateral, delivery mechanisms.
- v.** IOU program interactions with CEC, ARB, Air Quality Management Districts, local government programs, other government programs as applicable
- vi.** Similar IOU and POU programs

This third-party program only operates within SoCalGas’s service area. The Program is designed to support and complement SoCalGas’s core program activities. If it is determined that this program shares common elements with the IOU’s core programs, other third-party programs, or programs in other IOU service areas, SoCalGas and the Contractor will strive to coordinate the similar activities.

b) Program delivery and coordination

- i.** Emerging Technologies program
Not applicable to this program.
- ii.** Codes and Standards program
Not applicable to this program.
- iii.** WE&T efforts
Not applicable to this program.
- iv.** Program-specific marketing and outreach efforts (provide budget)
Program marketing developed by Contractor’s in-house marketing group will focus on materials and strategies to educate multifamily property owners, managers and tenants and generate direct install commitments. The Multifamily Home Tune-up Program will largely be driven by direct outreach to property owners, rather than large-scale mass marketing. Most program marketing materials will support these outreach activities with information about energy

2013-2014 Energy Efficiency Programs Multi-Family Home Tune-Up Program Implementation Plan

efficiency, its benefits and available programs to assist owners and tenants to install further efficiency measures designed to create an effective, unified message to prospective program participants.

Expected Program marketing materials include:

- Tenant relationship materials, including:
 - Notice of entry templates
 - Educational leave-behind materials
 - List of other available utility programs
- Program executive packets, including:
 - Energy efficiency benefit sheet
 - Operations and maintenance best practices
 - List of other available utility programs
 - Case studies
 - Guide to energy efficiency in the multifamily market
 - Information sheet about the Comprehensive Multifamily Retrofit program
 - Rebate application form for the Comprehensive Multifamily Retrofit program
 - Program contact information
- Trade magazine advertising
- Trade show marketing, including:
- Program informational brochures
- Trade show booth banner
- Program giveaways

v. Non-energy activities of program
Not applicable to this program.

vi. Non-IOU Programs

Because this program features close customer contact, on-site visual inspections of multifamily properties, and an ongoing sales process, Contractor will identify a list of measures that each property may install to achieve further efficiencies, including gas, electricity and water, both utility and non-utility sponsored. The Program will inform property owners about other opportunities to support its effort to reduce consumption and increase efficiency, such as:

- Boilers, commissioning and replacement with high-efficiency gas boilers and controllers
- High-efficiency gas central water heaters
- High-efficiency gas or electric storage water heaters
- High-efficiency dishwashers
- High-efficiency forced-air units and replacement filters
- Insulation in the walls, attics and floors
- Tank wrap
- Door and window caulking
- Low-flow toilets

2013-2014 Energy Efficiency Programs Multi-Family Home Tune-Up Program Implementation Plan

- ENERGY STAR qualified ceiling fans
- Compact fluorescent light bulbs (CFLs)
- High-efficiency refrigerators
- Water-saving sprinkler timers
- High-performance dual-pane windows

vii. CEC work on PIER
Not applicable to this program.

viii. CEC work on codes and standards
Not applicable to this program.

ix. Non-utility market initiatives
Not applicable to this program.

c) Best Practices

The program design incorporates various best practice elements. The Contractor's process utilizes best practices sales techniques to develop relationships with multi-family decision-makers, educate them about the benefits of efficiency measures, garner energy savings through direct install services, and identify and implement efficiency measures that will add the most value to their properties

Specific items include¹:

- Program Theory and Design: Program is tailored to the unique needs of the sector and understands the financial and ownership structure of the local multi-family market and the relationships among the various market actors.
- Program Management – Project Management: Contractor has developed and retains institutional knowledge of the multi-family building sector and lessons learned as implementation structures shift over time.
- Program Implementation – Participation Process: Program provides support to building owners throughout the process.
- Program Implementation – Marketing and Outreach: Program works with property owners and other market participants to help them succeed according to their objectives, and promote program benefits that align with these objectives.

In addition, lessons learned of the multi-family market will be applied to develop the strategies included in the proposal for this program. Key strategies the Program will employ to create this pipeline include the following:

- Work closely with SoCalGas account managers, program managers and other stakeholders to generate the greatest possible benefits from SoCalGas's current relationships and programs
- Focus on specific audiences — investors, owners and managers of multifamily properties — in an introductory program Road Tour designed to generate interest among these key decision-makers

¹ The best practices listed below are identified in the *National Energy Efficiency Best Practices Study, Volume 5 – Crosscutting Best Practices and Project Summary*, Quantum Consulting, Inc., December 2004.
Southern California Gas Company

2013-2014 Energy Efficiency Programs Multi-Family Home Tune-Up Program Implementation Plan

- Employ a lead-qualification sales process to help move the most-promising projects through the project pipeline

d) Innovation

Although not highly innovative, this program uses specific methodologies and approaches to help achieve its goals and objectives.

e) Integrated/coordinated Demand Side Management

This program will take advantage of face-to-face interaction with property owners and representatives to communicate opportunities for an integrated DSM approach. While the program itself does not offer all DSM opportunities, it will provide the contact to offer a full complement of DSM programs.

f) Integration across resource types (energy, water, air quality, etc)

The Program will seek to integrate electricity and water savings information into discussions with property owners and managers.

g) Pilots

There are no pilots currently considered for this program.

h) EM&V

The utilities are proposing to work with the Energy Division to develop and submit a comprehensive EM&V Plan for 2013-2014 after the program implementation plans are filed. This will include process evaluations and other program-specific studies within the context of broader utility and Energy Division studies. More detailed plans for process evaluation and other program-specific evaluation efforts cannot be developed until after the final program design is approved by the CPUC and in many cases after program implementation has begun, since plans need to be based on identified program design and implementation issues.

7. Diagram of Program

No specific program diagram for this third party program has been developed. Any program linkages are discussed in Section 6.

2013-2014 Energy Efficiency Programs Multi-Family Home Tune-Up Program Implementation Plan

8. Program Logic Model

