

# Multifamily Energy Efficiency and Electrification Program Opportunities

November 14, 2024



# Agenda



## Introduction



## Program layering and the SPOC service



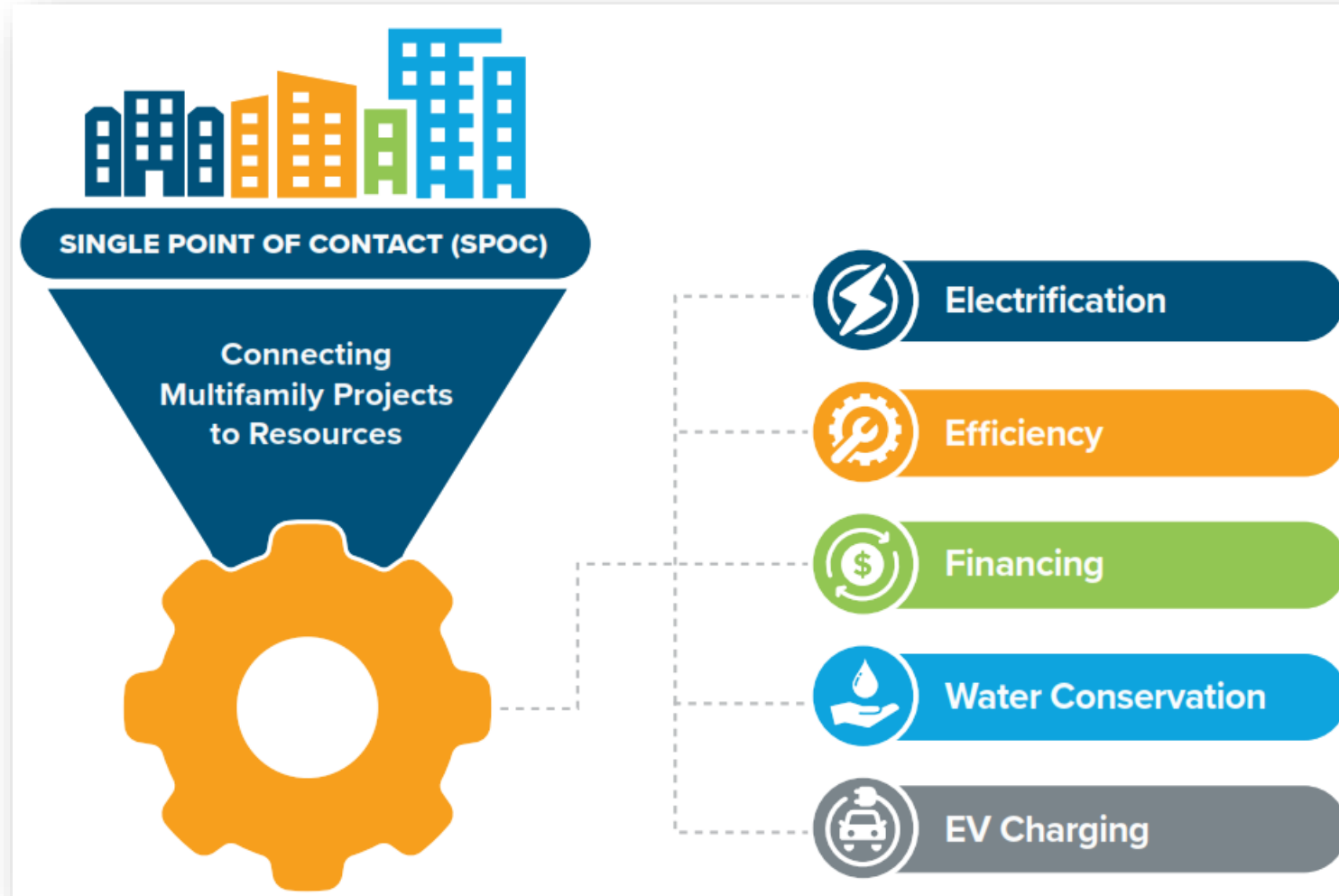
## Program presentations:

1. ESA MFES: Alissa Tambone TRC
2. LIWP: Brianna Sparling, AEA
3. SOMAH: Joyce Tang, Center for Sustainable Energy
4. BAMBE: Natalia Guerrero, Stop Waste
5. CA Energy-Smart Homes: Melinda Dinin, TRC
6. TECH Clean California: Nick Dirr, AEA
7. GoGreen Financing: Jonathan Verhoef, CAETFA



## Q&A, Next steps for your projects

# Single Point of Contact (SPOC) Service





# The SPOC Service

The screenshot shows a web browser at pgemultifamily.com. The navigation bar includes links for Home Page, Interest Form, Programs, and Resources. A hero banner features the text: "The PG&E Single Point of Contact service helps customers find multifamily program offerings to achieve carbon free affordable energy consumption. Contact us before making upgrades so we can best assist you." Below this is a "Refine Your Search:" section with filters for Program Type (Show All), Project Type (Existing building), and Affordability (Show All), along with a blue "Filter" button. The results section displays "19 Programs Identified in Zip Code 95620" with a yellow "Start Over" button. An email input field contains "youremail@email.com" and an "Email Results" button. A link says "Want to learn more about these recommended programs? Submit an interest form here". At the bottom, a table header lists columns: Name, Description, Program Type, Project Type, and Affordability.

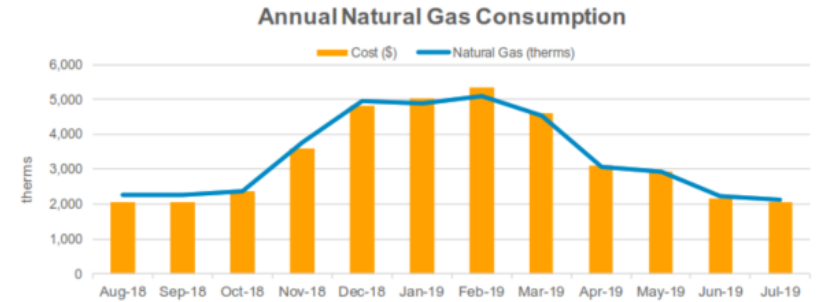
## Get in touch with us today.

Contact us directly by calling 866-352-7457 or emailing [MultifamilySPOC@TRCcompanies.com](mailto:MultifamilySPOC@TRCcompanies.com).

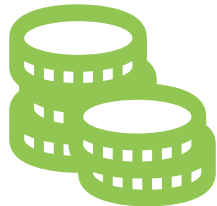
# One Stop Shop



## Benchmarking



## Program Referral & Layering Support



## Financing Coordination

# ESA Multifamily Energy Savings Program





# What is the Multifamily Energy Savings Program?



**ESA Multifamily Energy Savings** offers no-cost and reduced-cost energy efficiency and electrification upgrades, along with complimentary project assistance, to eligible affordable multifamily properties and residents throughout the great state of California.

**Common area & in-unit upgrades now provided under same ESA multifamily program.**

**Program will be implemented through Dec. 2026  
Accepting applications now!**

*ESA = Energy Savings Assistance*

# Which Properties Are Eligible?



- **Existing property** – no new construction
  - **Equipment** must be at least 5 years old to retrofit
  - **Receive electric or natural gas service from:**
    - Pacific Gas and Electric (PG&E)\*
    - San Diego Gas and Electric (SDG&E)\*
    - Southern California Edison (SCE)\*
    - Southern California Gas Company (SoCal Gas)
- \*CCA customers are eligible*
- **Properties must have five or more units** with each unit sharing at least a wall, floor, or ceiling with another.
  - **Incentive coverage** varies for deed and non-deed restricted properties for common area measures.
    - Eligible in-unit measures offer 100% cost coverage, regardless of deed status.
  - **Income thresholds** are established at 250% of federal poverty, based on household size.



# Income Eligibility



## Deed-restricted properties

- Multifamily residential complexes that are financed with low-income housing tax credits, tax exempt mortgage revenue or general obligation bonds or local, state or federal loans or grants
- 65% of households with income levels at or below 250% of the Federal Poverty Guidelines
- All in-unit upgrades are **100% cost-covered**
- Up to 100% of eligible common area project costs are covered



## Non-deed-restricted properties

- 80% of residents have incomes at or below 250% of the Federal Poverty Guidelines
- All in-unit upgrades are **100% cost-covered**
- Up to 50% co-pay for common area project costs

# Real Results. Real Cost Savings.



## The Altenheim Senior Living Community

In 2021, the ESA Common Area Measures (CAM) Program helped cover the cost of new, energy-saving equipment at Eden Housing's The Altenheim in Oakland, CA. Upgrades are saving the community an estimated **\$12,000 annually on energy bills.**



## Woodcreek Terrace

Woodcreek Terrace Senior Apts. in Roseville, CA leveraged both the ESA CAM program and the ESA In-unit program to complete a **\$59,417** holistic renovation for their residents.



## Countrywood Apartments

A family housing property in Marysville, CA received no-cost lighting upgrades, a new efficient water heating system and advanced technical assistance. The project saved the property **nearly \$10,000 in energy costs** in the first year.



## AARTI Hotel

A property that houses formerly unhoused youth in the Tenderloin District of San Francisco completed a lighting retrofit with funding from ESA CAM. The upgrades have helped reduce owner utility bill costs by **approximately \$3,500 per year.**

# Connect With Us



**Multifamily Energy Savings program website:**  
[www.ESAMultifamily.com](http://www.ESAMultifamily.com)

**Northern Multifamily Energy Savings**

**Utility:** PG&E

[connect@esamultifamily.com](mailto:connect@esamultifamily.com)

866.352.7457

**Southern Multifamily Energy Savings**

**Utilities:** SDG&E | SCE | SoCal Gas

[SouthernMFES@rhainc.com](mailto:SouthernMFES@rhainc.com)

866.211.3335

# Thank You!

**Alissa Tambone**

Sr. Manager, Customer Outreach Strategy

[ATambone@TRCcompanies.com](mailto:ATambone@TRCcompanies.com)

# Low-Income Weatherization Program (LIWP)



# Program Overview

- **Low-Income Weatherization Program (LIWP)** offers statewide rebates to affordable multifamily properties for energy efficiency measures, electrification, and solar PV.
- Offers financial incentives, property assessments, work scope development, construction management assistance, quality control, and energy benchmarking
- All measures that result in greenhouse gas (GHG) reductions are eligible. Incentives are based on GHG reductions
- PV incentives are based on the size of the PV system



Energy Efficiency



Solar Photovoltaics



Building Electrification

# Property Eligibility Criteria

- **Property must contain 5 units or more**
  - At least 1 building must have 5 units. If not, the property must have 20 total units
- **Have a deed restriction or funding commitment by a housing agency**
- **At least 66% of tenants with incomes < 80% AMI**
- **Able to achieve modeled energy savings > 15%**
  - **25% minimum savings required for projects that leverage other major incentive sources (i.e. TCAC, etc.)**
- **Must sign Property Affordability Covenant agreeing to maintain LIWP affordability requirements for at least 10 years**
- **Incentives cannot exceed net project cost**
- **Maximum of 1500 units per ownership entity/subsidiaries of one entity**

# Co-Leveraging with LIWP

- LIWP technical assistance includes referrals to other EE, electrification, and solar programs.
- LIWP can be co-leveraged with \*most\* programs!
- We encourage property owners to take advantage of other programs to maximize funding & get projects cost-covered!
- Total incentives (including co-leveraged funds) may not exceed the total project cost.
- 25% minimum savings required





# List of Required In-Unit Energy Efficiency Upgrades

Measure Category	Measure Type	
Water Heating	Low flow kitchen aerators	<1.8pgm at 60psi
	Low flow bathroom aerators	<1.2gpm at 60 psi
	Low flow showerheads	<1.8gpm at 80psi
Heating and Cooling	Duct sealing	Where ducts or plenums are accessible, seal seams and connections with mastic Seal supply boots to drywall with caulk
	Replace all incandescent and halogen bulbs with LED equivalent	If applicable
Lighting and Appliances	Replace any refrigerator manufactured before 1999 rated 750 kWh annual consumption or more	



# List of Measures Eligible for Incentives



Measure Category	Measure Type	
<b>Building Shell</b>	Cool roof Roof insulation Attic insulation Wall insulation Floor insulation	Window/sliding door replacement Window coatings Window shading Air sealing
<b>Heating and Cooling</b>	Heating system replacement Cooling system replacement Fan replacement Pump replacement	Duct insulation HVAC system controls Energy Management Systems
<b>Water Heating</b>	Water heater/boiler replacement Variable speed pumps Recirculation controls	Pool, spa pumps and equipment Low flow fixtures (kitchen/bath) Pipe insulation
<b>Lighting and Appliances</b>	Indoor, outdoor, parking lot, and garage lighting	Refrigerators Dishwashers Clothes washer and dryers (incl. common area coin-op)
<b>Renewable Energy</b>	Solar hot water systems (thermal)	Solar photovoltaic

# Project #1




## Project Overview

- 7 story building built in 1925 in Downtown, SF (Tenderloin)
- 55 studio apartments serving low-income individuals

## Leveraged Incentives Summary

Total Project Costs	<b>\$351,710</b>
Total Incentives	<b>\$354,812</b>
1. LIWP	\$137,562
2. BAMBE	\$151,250
3. TECH	\$66,000
<b>Remaining Project Cost</b>	<b>Cost Covered!</b>

## Scope of Work

1	Central Heat Pump Water Heating	
2	Variable Speed Recirculation Controls	
3	Energy Star Refrigerators	

# Project #2

...currently under construction!

## Project Overview

- 4 building project in Long Beach, CA.
- 46 Studios of affordable and permanent supportive housing
- Pursuing a full electrification scope of work that will be covered at cost by leveraging 4 programs!

## Leveraged Incentives Summary

Total Project Costs	<b>\$944,570</b>
Total Incentives	<b>\$975,355</b>
1. LIWP	\$235,785
2. MAHEP	\$410,550
3. TECH	\$157,200
4. Energy Smart Homes	\$171,800
<b>Remaining Project Cost</b>	<b>Cost Covered!</b>

## Scope of Work

1		LED Lighting
2		Low Flow Water Fixtures
3		Ductless Heat Pump HVAC*
4		Heat Pump WH*
5		Pipe Insulation
6		Variable Speed Recirculation Controls
7		Induction Stoves*
8		Electrical Upgrades
9		Electric Dryers*

\*ELECTRIFICATION MEASURE



# Thank you!

To get started, submit an [interest form](#) OR reach out to [LIWPinfo@aeacleanenergy.org](mailto:LIWPinfo@aeacleanenergy.org) with any questions.



# Solar on Multifamily Affordable Housing (SOMAH)



# Intro to SOMAH

- Statewide Incentive Program
- Up to **\$100 million** annually over **12 years**
- **Incentives** for solar on multifamily affordable housing funded by **greenhouse gas auction proceeds**, not taxpayer dollars
- Benefits for **property owners and tenants**
- Goal to install **300 Megawatts** by 2032



SOMAH

# Benefits of SOMAH

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**Financial incentives** to substantially cover solar PV costs

Common area electric **costs savings**

**Energy bill savings** for tenants and properties

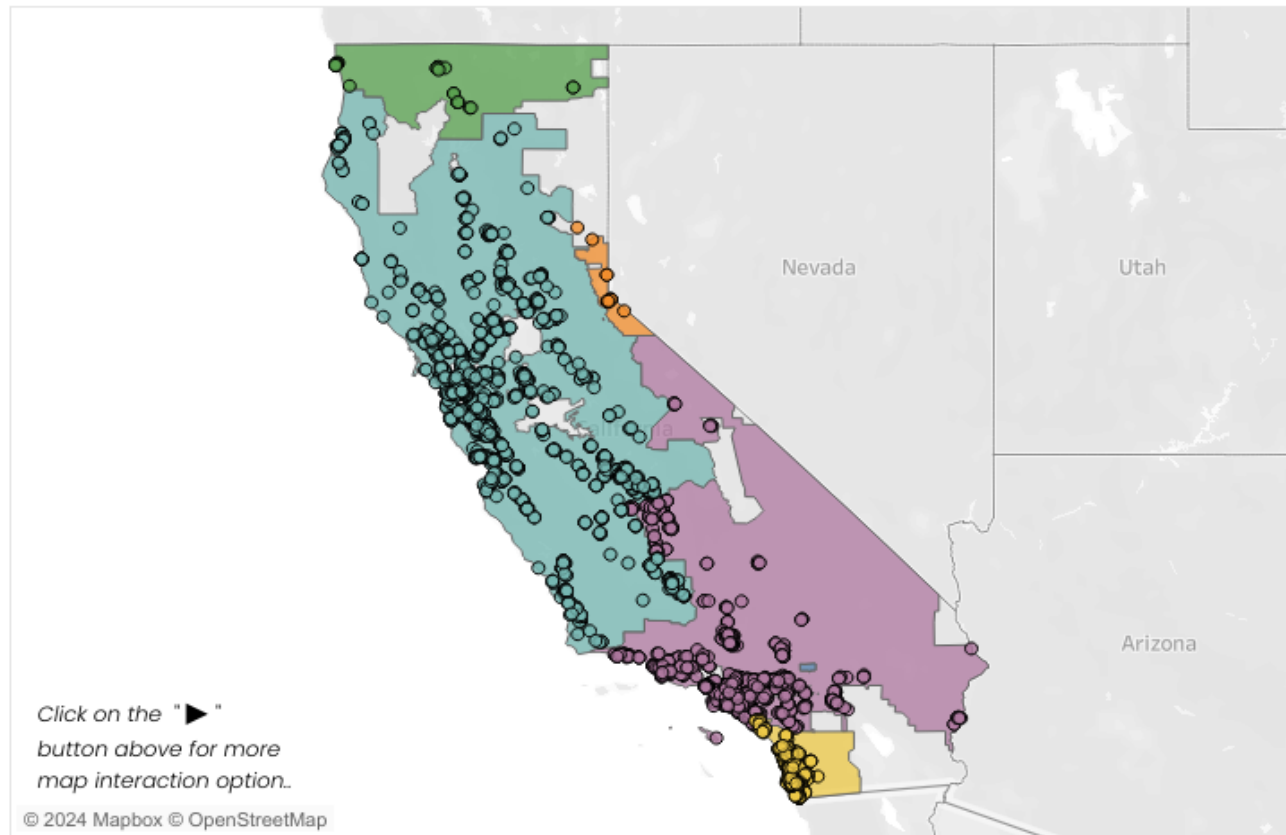
Free technical **assistance and support services**





# SOMAH Potential by IOU Territory

## Property Locations by Electric Utility Territory

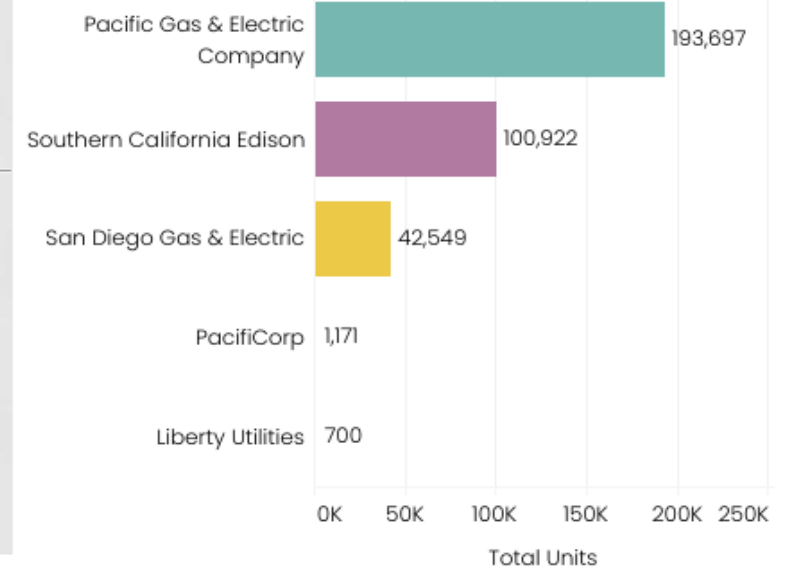


The **Property Locations by [2] Electric Utility** map displays the location of properties likely eligible for the SOMAH Program. The color shows details about Electric Utilities.

## Eligible Property Summary

Total Properties: **4,459**  
Active SOMAH Properties: **392 (9%)**  
Completed SOMAH Properties: **132 (3%)**

## Total Units by Electric Utility



This chart shows the number of affordable housing units by electric utility.

# Property Eligibility

## Deed-Restricted

Affordable housing regulatory agreement with at least 10 years remaining on term, and **one** of the following:

- Located in a disadvantaged community (DAC)
- 66% of residents < 80% AMI
- Property is owned by a tribe or a public housing authority

## Property Requirements

- Existing or retrofit rental housing buildings or mobile homes
- **Five** or more units
- **Individually metered units**

## Service Territories

Five investor-owned utilities (PGE, SCE, SDGE, Liberty, PacifiCorp)

# Incentive Rate Structure

Tax Credits		\$ per AC Watt Incentive	
ITC	LIHTC	Tenant	Common
No	No	\$3.50	\$1.19
Yes	No	\$2.45	\$0.87
No	Yes	\$2.45	\$0.87
Yes	Yes	\$1.75	\$0.65

ITC = federal investment tax credit | LIHTC = low-income housing tax credit

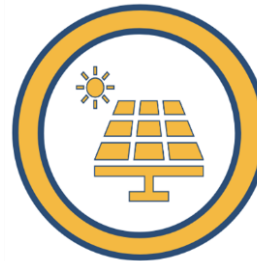
# Technical Assistance and Support Services

## PLANNING



- Energy Efficiency Program Leveraging
- Solar Feasibility
- Financial Assistance
- Contractor Bidding Support, Bid and Solar Design Review

## INSTALLATION



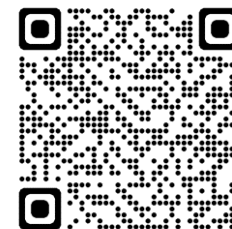
- General Project Support
- Permitting and Interconnection Support
- Tenant Education Support
- Job Training Support
- Navigating SOMAH Milestones

## COMPLETION



- Fleet Monitoring
- O&M Support
- Continued Tenant Education
- Tenant Hotline
- Completed Projects Toolkit
- System Monitoring Guides

If you would like to request Technical Assistance and Support Services, use the QR code or complete the request form at [CalSOMAH.org/TA-Request](https://CalSOMAH.org/TA-Request).



## Submit an Application

Apply

Congratulations, and thank you for choosing SOMAH to help with your property's solar project. Applications are accepted through our online portal, PowerClerk, which tracks your project's progress and keeps your paperwork organized in one location. Keep in mind, we're here to assist you throughout the whole process.

Select from one of the following to access the PowerClerk system:

### New Users

Select your utility company ▼

APPLY →

### Returning Users

Select your utility company ▼

LOGIN →

### Affordability Prescreen Request

Not sure if your property's deed restriction or regulatory agreement meets SOMAH's eligibility requirements? Take advantage of the **Affordability Prescreen Request** service by submitting a copy of the restriction or regulatory agreement to receive feedback! No formal application is required to use the service. The feedback will culminate in a Notice of Affordability Prescreen Eligibility or Ineligibility. The Notice of Affordability Prescreen Eligibility can be used to streamline future application steps.

Visit [CalSOMAH.org](https://CalSOMAH.org) to apply

## Schedule an Interest Call

### Non-Profit Housing Providers

Rachael Diaz,  
[rdiaz@chpc.net](mailto:rdiaz@chpc.net)

### For-Profit Housing Providers

Alyssa Golinar,  
[Alyssa.Golinar@CalSOMAH.org](mailto:Alyssa.Golinar@CalSOMAH.org)

# Bay Area Multifamily Building Enhancements Program



# The Bay Area Regional Energy Network (BayREN)

The Bay Area Regional Energy Network (BayREN) is a **coalition** of the Bay Area's **nine counties** — a network of local governments and the Association of Bay Area Governments (ABAG) partnering to **promote energy, water and greenhouse gas reduction** for residents, small businesses and local governments.



# Bay Area Multifamily Building Enhancements Program (BAMBE)

The program seeks to remove obstacles for improving multifamily buildings, promoting energy savings, and enhancing resident well-being.

**650+**

Properties

**45,000+**

Units upgraded

**\$30 Million +**

Incentives paid





# Bay Area Multifamily Building Enhancements (BAMBE)

No-Cost Technical Assistance and Rebates for Energy Retrofits



# 1. No-cost Technical Assistance (TA)

- Provided in partnership with the Association for Energy Affordability (AEA)
- Energy usage analysis and scope development
- One-stop-shop to connect with contractors, financing and additional programs
- Zero-obligation



## 2. Cash Rebates

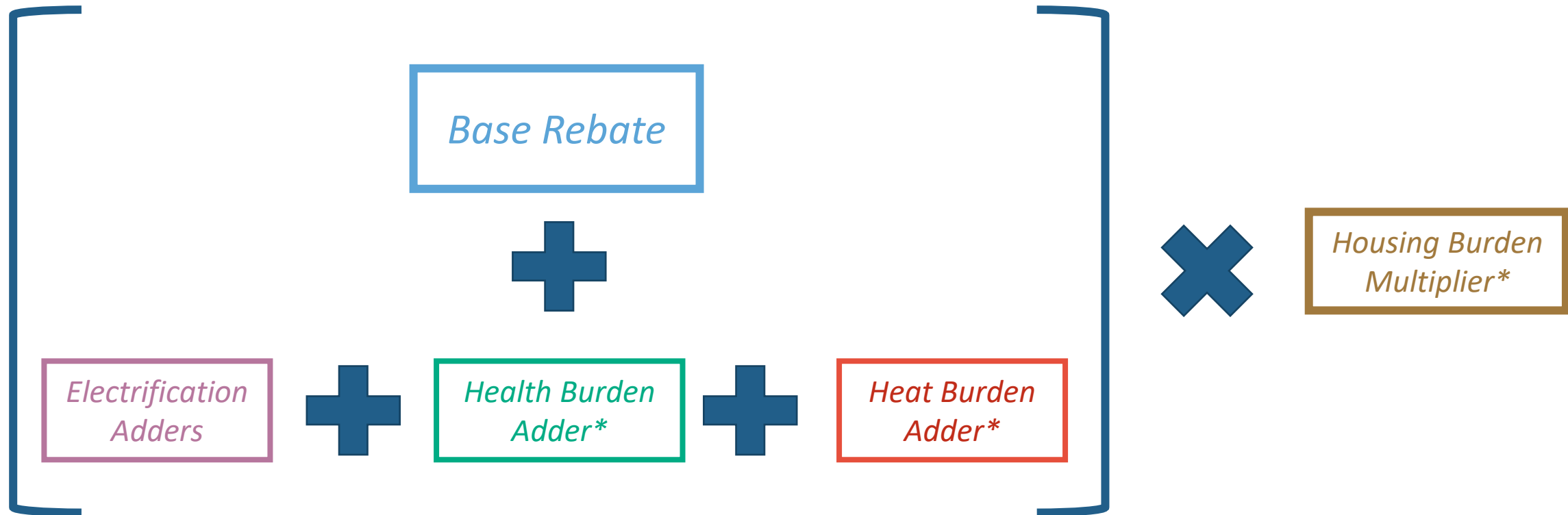
- **Rebates ranging from \$500-\$6,000+ per unit**
  - Base rebate of \$500/unit
  - Rebate adders for properties pursuing electrification and those located in high-priority communities
- **Have 12 months to complete agreed-upon scope of work**
- **Choose your own licensed contractors**
- **Financing options are available to fill gap between rebate and project cost**

# Electrification Adders

Eligibility	Eligible Measures	Rebate Amount
All properties in BayREN territory are eligible	In-unit Heat Pump Water Heater	\$1500 per apartment upgraded
	In-unit Heat Pump HVAC	\$1500 per apartment upgraded
	In-unit Laundry Dryer	\$250 per apartment upgraded
	In-unit Electric Cooking	\$750 per apartment upgraded
	Central Heat Pump Water Heater	\$1000 per apartment served*
	Central Heat Pump HVAC	\$1000 per apartment served
	Common Area Heat Pump HVAC	\$1000 per equipment
	Laundry/Common Area HP Water Heater	\$1000 per equipment
	Heat Pump Pool Heater	\$1000 per pool/spa
	Electric Panel Upgrades	Up to \$1000 per unit for subpanel & up to \$5000/property for central/common area

\*Property cap of \$100,000. Program cap of \$500,000

# How is my rebate determined?



*\*Geographic "Adders" only available to properties in select census tracts*

# BAMBE program requirements

## Eligibility:

- Existing residential properties **located in the 9-county Bay Area** and served by PG&E
- Must have **5 or more dwelling units** (renter- and owner-occupied both eligible)

## Requirements:

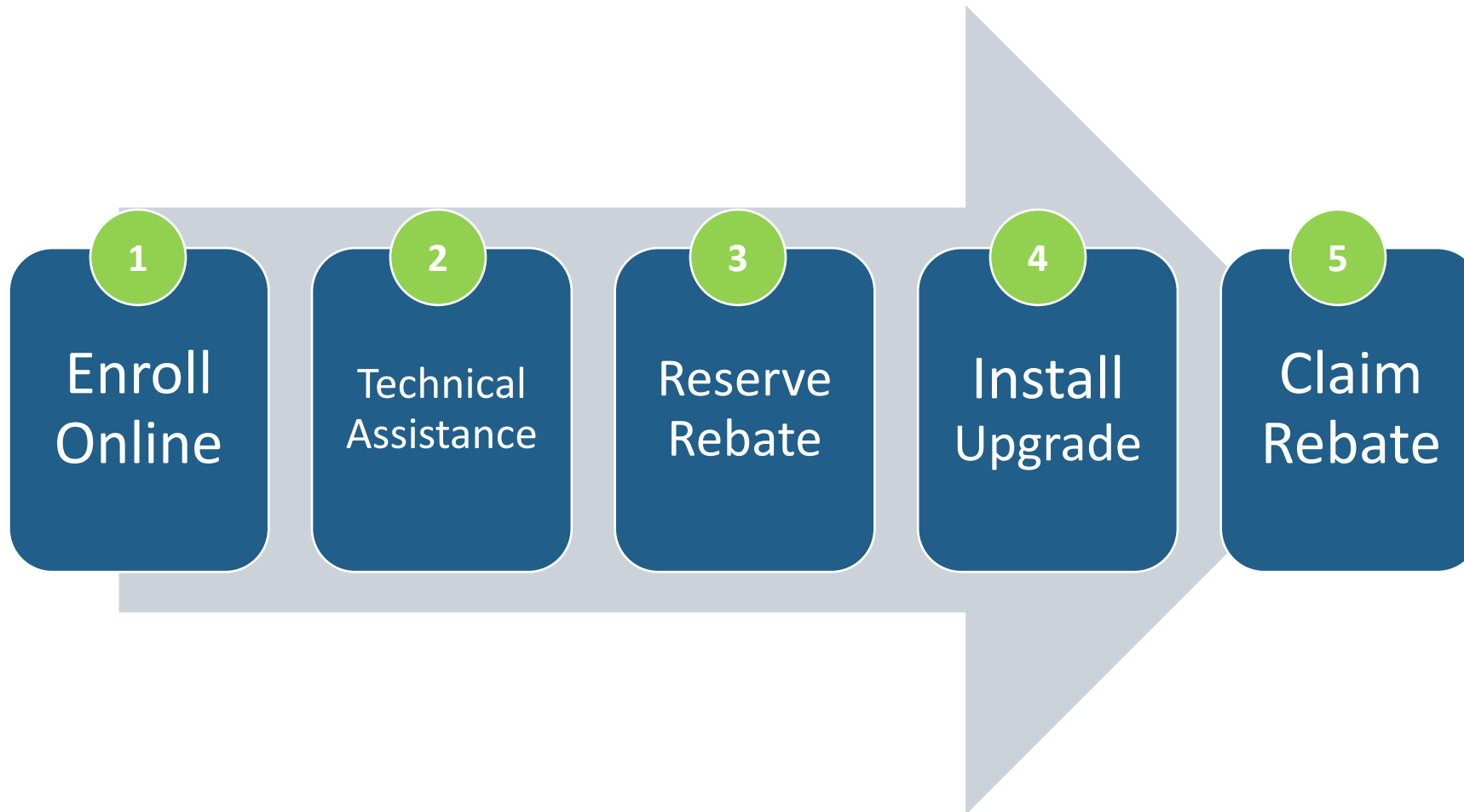
- Must install 2 or more unique measures that achieve combined modeled energy savings of at least 10%

# Getting Started

## Bay Area Multifamily Building Enhancements



# 5 Simple Steps





# Interest Form

## » Interest & Eligibility

If you're a multifamily property owner interested in significant rebates and consulting for building energy upgrades in the Bay Area, complete and submit this form to let us know you're interested in the program.

A BayREN representative will contact you within five business days.

*The program requires multiple energy efficiency and/or electrification measures. Rebates typically cover a significant portion of project costs and are paid after installation.*

### BAMBE Eligibility

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**First Name \***

**Last Name \***

**Property Contact Type**

Property Manager

Property Owner

Homeowner

**Are you the decision-maker for the property? \***

No

Yes

**Enroll Online Today:**  
[www.bayren.org/eligibility](http://www.bayren.org/eligibility)

**Thank you!**

**Learn more & roll online at:**

[Bayren.org/multifamily](https://Bayren.org/multifamily)

**Contact the program:**

855-213-2832 or [multifamily@BayREN.org](mailto:multifamily@BayREN.org)

**My Contact:**

Natalia Guerrero | Program Specialist

[NGuerrero@StopWaste.org](mailto:NGuerrero@StopWaste.org)

# California Energy-Smart Homes Program



# California Energy-Smart Homes



## Eligibility:

- **Territory:** California electric IOUs (PG&E, SCE, SDG&E)
- **Building Types:** Single family, duplexes, triplexes, condos, multifamily low-rise (3 stories or fewer), and ADUs
- **Income Restrictions:** None



**Funding Source:** California Public Utility Commission (CPUC)



**Incentives:** Capped at 1,500 units per developer/property owner



**Whole Building Electrification Alteration Incentives**



# Whole Building Electrification Incentive Eligibility



- Receive electric service from **PG&E, SCE, or SDG&E**
- Single family, ADU, or multifamily low-rise (up to three stories)
- Cap all natural gas lines to the home
- Work with a licensed California contractor to replace all fossil fuel combustion equipment and appliances with advanced electrical systems including:



**Heat Pump  
Space  
Heating/Cooling**



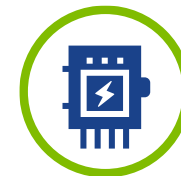
**Heat Pump  
Water Heating**



**Induction  
Cooking**



**Electric  
Clothes Dryer**



**Infrastructure  
Upgrade**

# Whole Building Electrification Incentives

<b>Per Unit Incentives</b>	<b>2024</b>	<b>2025</b>
<b>Single Family Dwelling Unit</b>	\$4,250	\$3,750
<b>Single Family Infrastructure Upgrade Bonus</b>	\$1,000	\$1,000
<b>Multifamily Low-Rise/ADU Dwelling Unit</b>	\$2,200	\$2,000
<b>Multifamily Low-Rise/ADU Infrastructure Upgrade Bonus</b>	\$600	\$600
<b>Heat Pump Dryer Bonus</b>	\$250	\$250

*Projects must submit a full application package that includes all verification documents, by November 1 to receive that program year's incentive amount.*

# Advanced Technology Bonuses



## Whole Building Electrification Alteration Bonuses

Whole Building Electrification Alteration Advanced Technology Bonus Incentives per Enrolled Dwelling Unit	Single Family	Multifamily Low-Rise
<b>Variable Capacity Heat Pump (VCHP)</b>	\$300	\$300
<b>Heat Pumps without Electric Resistance</b>	\$300	\$300
<b>Integrated Heat Pump Space and Water Heating</b>	\$1,000	\$1,000
<b>Low Global Warming Potential (GWP) Heat Pump</b>	\$800	\$800
<b>Heat Pump Pool or Spa Heater</b> (per installed piece of equipment)	\$1,000	\$1,000
<b>Central Heat Pump Water Heater Design</b> (per project/developer and must include full MEP design, cost, and documentation)	N/A	\$5,000
<b>Central Heat Pump Water Heater Installation</b> (per unit served)	N/A	\$500

# Alteration Participant Journey



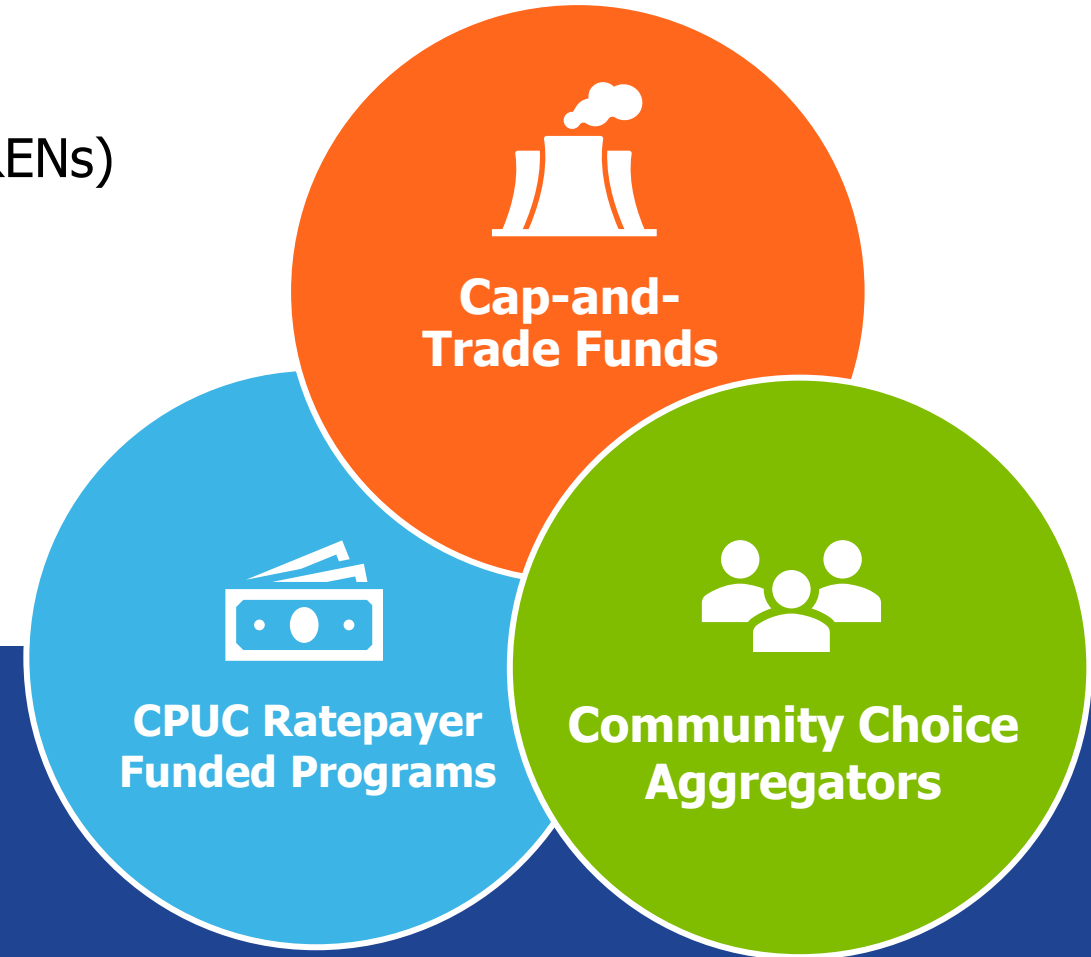
Remember to get **before photos** (including name plate) of each end use gas appliance being replaced



# Layering Incentives and Rebates for Alterations

## Additional funding sources:

- TECH Clean California
- BayREN and other Regional Energy Networks (RENs)
- Local Community Choice Aggregators (CCAs)
- Local Water Districts
- IRA Tax Credits and HEEHRA Rebates



# California Energy-Smart Homes Resources



## Contact us:

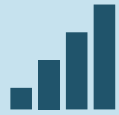
- (833) 987-3935
- [caenergysmarthomes@trccompanies.com](mailto:caenergysmarthomes@trccompanies.com)
- [caenergysmarthomes.com](http://caenergysmarthomes.com)

# TECH Clean California



# TECH Clean California's Strategic Vision

California's flagship heat pump market transformation initiative for space and water heating is designed to help achieve the state's 2030 heat pump goals and inform a path towards carbon-free homes by 2045.



## Spur the clean heating market through statewide strategies

*Incentives, supply chain engagement, workforce development, consumer education*



## Pilots and Quick Start Grants to address market barriers

*6 pilots, 19 Quick Start Grants*



## Inform long-term building electrification planning

*Public data reporting: project cost, carbon, grid, bill impacts and best practices*

### Deployment To Date:

- > 1,000 contractors participating
- Single Family: > 30,000 units
- Multifamily: > 10,000 units
- 38% of incentives deployed in equity communities
- >1,500 downloads of TECH Clean California's anonymized project datasets

**Market Demand + Workforce Capacity**



**Technology Maturity + Project Impacts**



**Incremental Cost + Hassle Factor**



# Multifamily TECH Incentive Allocations Over Time

	Launch Date	Status	Total Budget
First Round Funding (HPWH, HVAC, Electrical)	December 2021	Fully subscribed	\$12M
Second Round Funding (HPWH, HVAC, Electrical)	June and August 2023	Fully subscribed	\$7M
TECH Water Heating (HPWH Only)	December 2023 (Individual)	Waitlist	\$26.5M
	January 2024 (CHPWH)	Waitlist	\$6M
<b>TECH – HEEHRA (HPWH, HVAC, Electrical, Appliances)</b>	<b>Q4-2024</b>	<b>Stage One Applications Open</b>	<b>\$35M</b>
TECH - Small MF - HPWH only	Late 2024 (TBD)	Upcoming	TBD
TECH – New Funding- MF Standard Incentives (HPWH, HVAC, Electrical) AND Strategic Initiative Incentives	Early 2025 (TBD)	Upcoming	\$13.5M

# HEEHRA Phase I: Multifamily Rebate Table

Multifamily – Low-to-moderate income, max rebate per residential unit of \$14,000	Rebate Amount
Heat Pump for Space Heating or Cooling – Dual Speed (Heat Pump HVAC)	\$7,500
Heat Pump for Space Heating or Cooling – Variable Speed (Heat Pump HVAC)	\$8,000
Heat Pump Water Heater (Electric to Electric Heat Pump, cannot replace existing Heat Pump)	\$700
Heat Pump Water Heater (In-Unit)	\$1,750
Central Heat Pump Water Heater (per unit served)	\$1,750
Electric Load Service Center (Electric Panel)	\$4,000
Electric Wiring	\$2,500
Electric Stove, Cooktop, Range, or Oven	\$840
Heat Pump Clothes Dryer	\$840

\*Program and equipment eligibility requirements apply

\*\*Rebate incentive may be adjusted

# HEEHRA Phase I: Income Eligibility Requirements

**Low-income multifamily properties** categorized as <80 percent AMI (HEEHRA rebates can cover up to 100% of eligible project costs, not to exceed \$14,000 per unit)

- at least 66 percent of occupied living units below 80 percent AMI, where clearly listed on a TECH-HEEHRA approved Federal, State, or Local Deed Restriction/Regulatory Agreement,

OR

- at least 66 percent of occupied living units below 80 percent AMI, as verified by individual household income documentation, evidence of Section 8, and/or proxy documentation of categorical eligibility.

**Moderate income multifamily properties** categorized as ≤150 percent AMI (HEEHRA rebates can cover up to 50% of eligible project costs, not to exceed \$14,000 per unit)

In a disadvantaged community (DAC) and either:

- at least 50 percent of occupied living units are at or below 150 percent AMI, where clearly listed on a TECH-HEERHA approved Federal, State, or Local Deed Restriction/Regulatory Agreement

OR

- at least 50 percent of occupied living units are at or below 150 percent AMI, as verified by individual household income documentation, evidence of Section 8, and/or proxy documentation of categorical eligibility

Learn more at HEEHRA TECH Clean California [techcleanca.com/heelra](https://techcleanca.com/heelra)

# HEEHRA Phase I: Key Requirements

- Multifamily properties receiving HEEHRA funds must comply with California Department of Industrial Relations (DIR) Prevailing Wage and Public Works Requirements
- All Equipment must be ENERGY STAR Certified (alternative requirements will be provided for system types without ENERGY STAR certifications, including Central HPWH, Electrical Panels, and Wiring)
- Equipment cannot be purchased or installation started before HEEHRA reservation form final approval
- Existing Buildings Only (no new construction)
- Comply with all other program requirements (Property Assessments, H&S verifications, Combustion Appliance Safety, etc.)

Learn more at HEEHRA TECH Clean California [techcleanca.com/heehra](https://techcleanca.com/heehra)



# Thank You

*For more information or to get involved, contact:*

TECHMF@aea.us.org



 @TECHCleanCA  @TECHCleanCalifornia



Tre'Laine



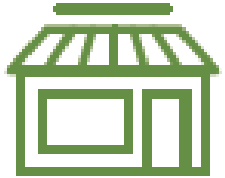
[www.techcleanca.com](http://www.techcleanca.com)

# GoGreen Multifamily Energy Financing Program

gogreen  
FINANCING™

# What is this program?

## GoGreen Multifamily Energy Financing



- ✓ State-administered program
- ✓ Supported by the Investor-Owned Utilities (IOUs) including PG&E
- ✓ Leverages private capital to offer **attractive rates and terms for green energy retrofits** in the small business sector

## That means...

*Attractive financing terms and greater energy savings!*

- ✓ Helps save money and energy with no upfront costs
- ✓ Options for **pre-funding and progress payments**
- ✓ Close **larger-value projects** that combine efficiency upgrades with non-energy improvements

# GoGreen Multifamily Overview

- **Financing for energy efficiency and clean energy projects or equipment**
- **In-unit and common area installations both qualify**
- **May use On-Bill Repayment if the property is master metered**
- **Market Rate and Naturally Occurring Affordable Housing**
- **Must meet definition of SMB**
  - 100 or fewer employees, or
  - Meet SBA small business size requirement (Lessors of Residential Buildings - \$34.0MM or less in annual revenue)
- **Affordable Properties**
  - Customer must have a recorded affordability deed restriction or covenant with at least 5 years remaining
  - Customer restricted to occupancy for at least 50% of the total units to households meeting the requirements of the income limits no greater than “moderate”
  - Not required to meet definitions of SMB



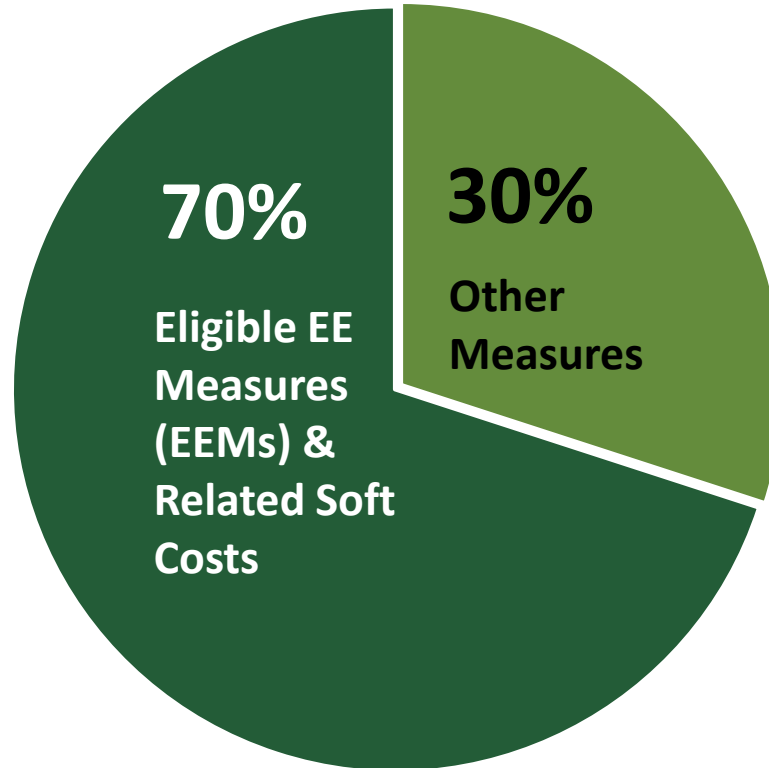
# How Customers Use GoGreen Financing

## GoGreen Financing's Eligible Energy Measures (EEMs) include:

- HVAC (inclu. Heat pumps) & duct sealing
- Water heaters (inclu. Heat pumps)
- Insulation & air sealing
- Window replacements
- Cool roofs
- Solar and battery storage
- Appliances and smart thermostats
- *And much more!*

## Related soft costs

- Code-required repairs, roof repairs, battery enclosures electrical panel upgrades, permits



## Borrower's Choice:

- Borrowers can use up to 30% of the total loan amount to finance non-energy property improvements like remodeling, and landscaping

# Clean Energy Generation and Storage

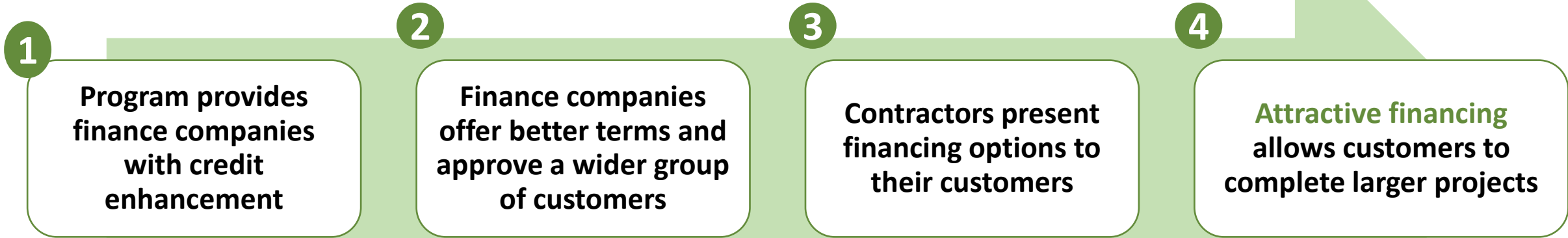
**GoGreen Financing has added clean energy generation and storage measures which reduce GHG**

**Measures include:**

- Solar PV
- Solar Hot Water
- Battery Storage
- Microgrid Infrastructure
- Smart EV Charging
- Wind Turbines



# How is this private financing better than walking into a bank?



## Finance companies offer customers benefits in exchange for the credit enhancement:

- ✓ Better terms
  - Lower rates
  - Longer tenure/repayment period
  - Larger amounts available
  - Lower contractor reserve requirement
- ✓ Approval of more customers
  - Shorter years in business requirement
  - Broader approvals based on income
  - Lower credit score minimums

# Participating Finance Companies

**A wide variety of finance companies offer diverse products to meet your customer's needs**

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- ✓ **Equipment leasing with credit approvals within two hours**
- ✓ **Energy Service Agreements where customer is guaranteed savings**
- ✓ **Recruiting solar lenders for longer terms**
- ✓ **Progress payments and prefunding up to 95%**
- ✓ **Credit union loans with exceptionally low interest rates**
- ✓ **Recruiting CDFIs and community lenders**

**Visit [GoGreenFinancing.com](https://www.GroGreenFinancing.com) to contact finance companies!**



# New Feature: On-Bill Repayment

- GoGreen Multifamily now has the option for customers to repay their financing agreement through their utility bill
  - Master metered properties only
- This option is currently available in SoCal Edison territory and will soon be available in all four IOU territories: SoCal Gas, SDG&E, and PG&E
- Convenient for customers, and can be treated as an operating expense



# Multifamily Funding Coalition

The State Treasurer's Office is working together with IBank, Sustento Group, and Inclusive Prosperity Capital to combine enhanced financing, incentives, tax credits, and other forms of funding into a handful of pre-made offerings for multifamily property owners in a "Storefront" model.

## State-Wide Market-Building & Pre-Development Development Infrastructure

- Standardized project development, leveraging local demand drivers
- Incentive stacking to maximize leveraged funding, and reduce risk
- Qualified project referrals to CDFIs

## Sustainable Underwriting for Resilience & Efficiency

- Tech-enhanced pipeline development and underwriting
- Standardized financing solutions with a single application
- Program development and capacity building to augment CDFIs' existing credit processes



California Infrastructure and  
Economic Development Bank

[ClimateFinancing@ibank.ca.gov](mailto:ClimateFinancing@ibank.ca.gov)



SUSTENTOGROUP

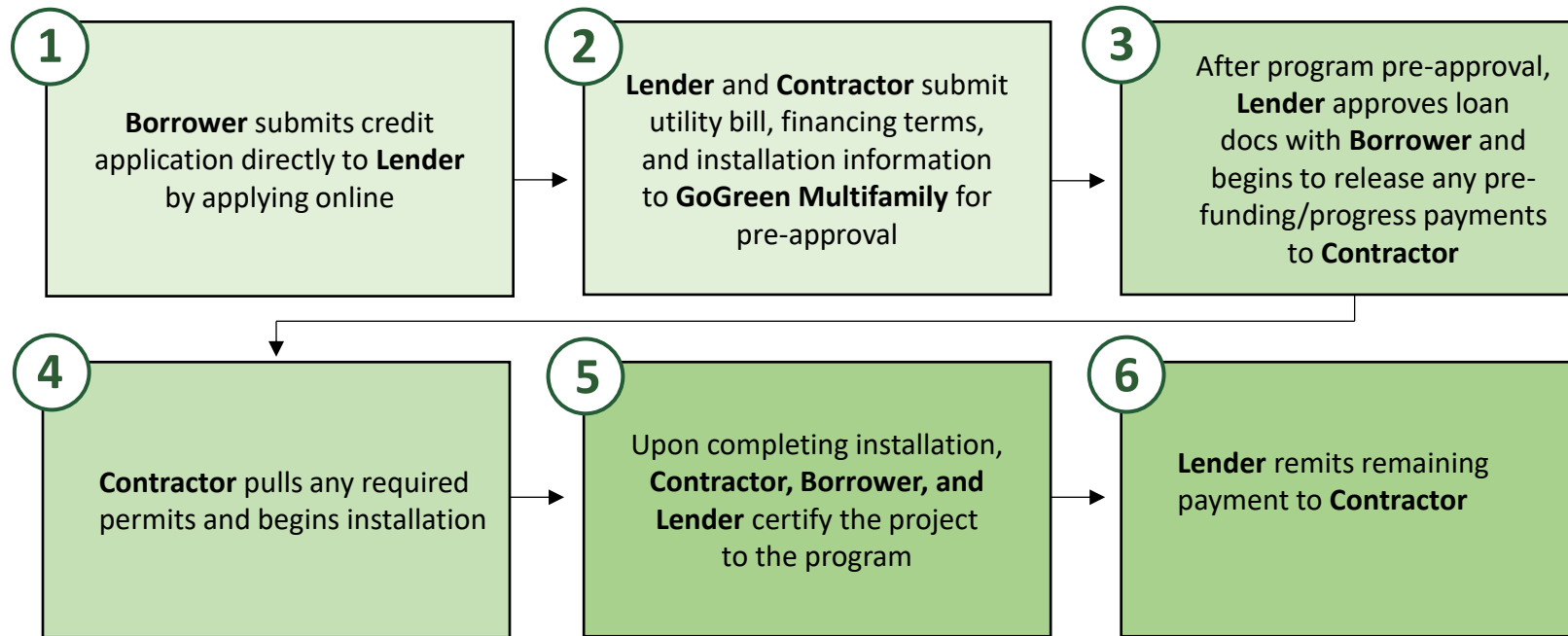
[info@sustentogroup.com](mailto:info@sustentogroup.com)



[info@GoSURE.org](mailto:info@GoSURE.org)

# GoGreen Multifamily Project Process & Documents

This graphic provides an overview of the **six-step project process** from approval to funding. Below you'll find **tips** to help you get projects approved and funded even faster.



- The customer's only contact with the GoGreen Multifamily program is a DocuSign certification email once installation is complete.

# Contact Us and Learn More

## *Call or email the GoGreen Financing team:*

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GGMF Program Specialist

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(916) 653-1375

**Josh McCarty**

GGMF Program Manager

[Joshua.McCarty@treasurer.ca.gov](mailto:Joshua.McCarty@treasurer.ca.gov)

(916) 591-3311

## *Learn more about GoGreen Financing online:*

[GoGreenFinancing.com/multifamily/](https://www.GoGreenFinancing.com/multifamily/)

[GoGreenFinancing.com/partners/lender-partners/business/  
Commercial Eligible Energy Measures \(EEMs\) List](https://www.GoGreenFinancing.com/partners/lender-partners/business/Commercial%20Eligible%20Energy%20Measures%20(EEMs)%20List)



# Questions

Please submit through the questions box



# Next Steps

- For program specific questions, please reach out to the respective program teams directly
- SPOC can help you identify relevant programs for your properties. For general questions, contact us!



Phone: 866-352-7457



Email: [multifamilySPOC@TRCcompanies.com](mailto:multifamilySPOC@TRCcompanies.com)



Website: [www.pgemultifamily.com](http://www.pgemultifamily.com)



# Thank You

## Joshua Nederhood, Deputy Program Manager

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- LinkedIn: <https://www.linkedin.com/company/multifamily-energy-program-hub>



**LIWP**  
**MULTIFAMILY**

*Nov 2024 SPOC Fall Webinar*





# Solar on Multifamily Affordable Housing

*Making solar technology and jobs accessible  
to California's low-income and Environmental  
Justice communities*

11/14/2024

Joyce Tang, Program Coordinator





Local Governments Empowering Our Communities

# Bay Area Multifamily Building Enhancements Program

2024

Natalia Guerrero / Program Specialist



# California Energy-Smart Homes

## Whole Building Electrification Alteration Incentives



# TECH MF Overview

## PG&E Multifamily SPOC

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November 14, 2024





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# Green Lending for Multifamily Properties

## *GoGreen Multifamily Energy Financing Program*

Administered by the California State Treasurer's Office

Supported by California's Investor-Owned Utilities (IOUs)