Safe Operations and Property Improvements in a Pandemic

Prioritizing Resident Needs During COVID-19

September 10, 2020
Agenda

Panel Overview
Panelist Presentations
• Patrick Isherwood
• Sarah Hill
• Marissa Van Sant
Questions
Speakers

Anna Grimes  
*PG&E Single Point of Contact*  
TRC

Sarah Hill  
*Director of Low Income Programs*  
Association for Energy Affordability

Patrick Isherwood  
*Director of Asset Management*  
Self-Help Enterprises

Marissa Van Sant  
*Senior Project Manager*  
TRC
Navigating EE Programs During COVID
Owner Background
Programs and their engagement
Mechanics and established schedules
Working through program deadlines & regulatory deadlines.
What strategies or resources are we pursuing?
The Challenges

- Contractor Contracts
- Pandemic
- CAM (Common Area Measures)
- Health and Safety
- Interaction
- Deadlines / Audits
Building the Puzzle

- Allocation of Resources
- Costs & Reimbursements
- Cash Flow
- Touching on Goals
Workable Solutions

- Communication
- Schedule and change of plans
- Vendors
- Virtual Audits
Next Steps – COVID End Date?

- How does this impact us moving forward?
- Change of plans?
- Operating post pandemic
  - keep moving forward
  - execute opportunities
Conclusion
The Association for Energy Affordability, Inc. is dedicated to achieving energy efficiency in new and existing buildings in order to foster and maintain affordable, healthy housing and communities.
COVID-19 Response
COVID-19 Response
Program Summary

$100 million annual budget

Pacific Gas & Electric, Southern California Edison, San Diego Gas & Electric, PacifiCorp, Liberty

Install 300 MW of solar PV on affordable housing in California
COVID-19 Response
Program Summary

Economic benefits for tenants
- At least 51% energy allocated to tenants

Community-based approach
- 4 Community Based Organizations

Technical assistance (TA)
- No cost TA to property owners, contractors

Encourage energy efficiency
- “Reduce before you produce”

Workforce development
- Encourage local and target hiring
Solar on Multifamily Affordable Housing Program

COVID-19 Response
COVID-19 Response
Challenges and Needs

● Ongoing situation and response
● PA issued surveys to understand COVID-19 impact
  ○ Financial impact
  ○ Timeline impact
    Construction
    Interconnection
  ○ Impact on job trainees and job training organizations
COVID-19 Response

Program Response

1. Created COVID-19 task-force tracking updates
2. Created COVID-19 webpage https://calsomah.org/COVID19 for resources and updates
3. Continue holding events, trainings and forums virtually
4. Issuing both program-wide and as-needed application extensions
5. Energy Efficiency Audit Postponement Request
COVID-19 Response
Participant Planning

Tenant safety

- Low-income communities and DACs are disproportionately more vulnerable to public health crises
  - Postpone any in-person tenant workshops
  - Postpone or do virtual in-unit audits
  - Exercise caution and mind social distancing guidelines

Questions?: tenants@CalSOMAH.org
Job training requirements and participant safety

- Safety is our priority.
- Needed more than ever
- Follow local, state, and federal OSHA guidelines on construction activities, social distancing, and jobsite safety
  - Webinar: Cal/OSHA COVID-19 Guidance for Construction
The SOMAH PA is dedicated to offering flexibility during this time.

If you are experiencing COVID-19 related delays with your application, extensions will be granted on an as-needed basis.

Solar installers are identified as essential workers.

All essential workers should continue to follow health and safety guidelines set forth by local and statewide public health offices.
## COVID-19 Response
### Funding and How to Get Started

<table>
<thead>
<tr>
<th>Utility</th>
<th>Total New Funding</th>
<th>Estimated Remaining Accounting for Waitlist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Utilities</td>
<td>$164,842</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>$895,140</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>$40,894,357</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SCE</td>
<td>$65,953,481</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>$16,400,559</td>
<td>Funds available today</td>
</tr>
</tbody>
</table>
Questions & Feedback

Email: contact@CalSOMAH.org
Web form: CalSOMAH.org/contact-us
General hotline: 858-244-1177 ext. 5
Tenant hotline: 800-843-9728
LOW INCOME WEATHERIZATION PROGRAM
for Multifamily (LIWP-MF)
OVERVIEW

• Whole building energy efficiency, solar thermal, and solar PV for multifamily properties under a single program

• All measures that result in greenhouse gas (GHG) reductions are eligible

• EE incentives (including solar thermal) are based on amount of GHG reductions

• PV incentives based on size of PV system
• Single point-of-contact
• No upfront cost to property owner
• Free energy audit and technical assistance
• Leveraging of other financial resources encouraged
• Free WegoWise benchmarking
• Incentives paid after installation of measures
# List of Measures Eligible for Incentives

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

• Construction Progress

• Site Verification
  Program Participants
  City Inspectors

• Cash Flow
  Construction
  Rent
COVID Response

• Construction Progress → Program Deadlines and Reservations Extended

• Site Verification → Virtual

• Cash Flow → Progress Payments, Material Purchase Payments
AVAILABLE FUNDING

$5 million

Farmworker Carve-out (open enrollment)

$9.5 million (Screening waitlist for enrollment)
- Funding available for all MF affordable properties
- In and outside of DAC territories
- In and outside of IOU territories
- Construction complete by May 2022
- Open enrollment for Homelessness carve out: $2 million

Permanent Supportive Housing
Transitional Housing
Shelters
GET STARTED!

www.camultifamilyenergyefficiency.org

Contact us:
liwpinfo@aea.us.org

Fill out an interest form here
California
Sarah Hill
Director of Low Income Programs
shill@aea.us.org
How Low-Income Energy Efficiency Programs are Responding to COVID-19

Marissa Van Sant, TRC
San Joaquin Valley Housing Collaborative Forum
September 10, 2020
This offering is funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission.

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Energy Savings Assistance: Common Area Measures (ESA CAM)

ESA CAM is a $25M EE incentive and technical assistance program serving income eligible, deed-restricted affordable multifamily properties.

Program overview

- Offers eligible properties incentives covering up to 100% of project cost for qualified energy efficiency (EE) retrofits.
- Upgrades are to be performed in common areas or on central systems.
- Additional no-cost services: on-site/virtual energy assessments, scope development and bid review technical assistance, and benchmarking.

Progress to-date

- Zero projects lost to COVID-19.
- 200 projects enrolled with scopes of work ranging from $2k to >$1M.
- >50% of $25M incentives reserved.

Administrator

Pacific Gas & Electric (PG&E)

Third-Party Implementer

TRC

Program cycle

2018-2020 (2021 coming soon!)
Eligibility Requirements

General Requirements
- PG&E service*
- ESA In-Unit coordination

Existing Multifamily
- 5 or more attached dwelling units
- Low or high rise

Deed Restriction
- Must be held to long term affordability by local, state, or federal agency

Income Eligibility
- Minimum 2/3 of residents meet ESA income requirements (200% of federal poverty level)

*Southern California Gas, Southern California Edison, and San Diego Gas and Electric have a similar offering within their service territories. Contact the Single Point of Contact (SPOC) at multifamilySPOC@trccompanies.com for a referral.
What is a Common Area?

- Hallways
- Laundry rooms
- Site parking and garages
- Leasing offices and lobbies
- Stairwells and elevators
- Outdoor spaces
- Community dining areas
- Community rooms
Eligible EE Measures

Available in the “Resources” section at www.esacommonarea.com
Process

Steps immediately impacted by COVID-19

Proposal

- Express interest
- Sign property owner affidavit
- Submit income documentation
- Sign application

Owner

- Arrange site visit
- Issue resident/site staff notice
- Participate in consultation call
- Select contractor(s) and obtain bids
- Establish proposed construction schedule
- Oversee/manage construction
- Participate in progress call(s)
- Notify program at construction completion
- Provide completion documents
- Detailed invoices
- Permit docs, etc.
- Arrange site inspection (if requested)
- Receive payment

ESA CAM Staff

- Confirm income eligibility and common area opportunity
- Review Application
- Perform on-site audit, benchmarking
- Coordinate with ESA In-Unit
- Send assessment report
- Schedule consultation call
- Review contractor pricing
- Issue Project Approval letter
- Schedule installation progress call(s)
- Review completion documents
- Conduct desktop and/or on-site review of installation
- Issue payment
Response to COVID-19:
Program Updates

Policies & Procedures Update - July 1, 2020

- Program & construction deadline extension
- Phased payment policy update
- Virtual assessment addition
- Tracked county and property restrictions
Program Timeline

Projects with Project Approval Letter issued on or before March 1, 2020:

- ASAP
  Contact Case Manager to revise construction deadline in project approval letter
- December 31, 2020
  Construction deadline
- December 31, 2021
  ESA CAM program end date

All projects must complete construction as set forth in their Project Approval Letter or the construction deadline, whichever comes first.
Program Timeline

Projects with Project Approval Letter issued **on or after March 2, 2020:**

- **ASAP**
  - Contact Case Manager to revise construction deadline in project approval letter

- **July 1, 2021**
  - Construction deadline

- **December 31, 2021**
  - ESA CAM program end date

All projects must complete construction as set forth in their Project Approval Letter or the construction deadline, whichever comes first.
Program Timeline

Projects **without a Project Approval Letter:**

Once scope of work is approved
Projects will work with their Case Manager to build a construction timeline

July 1, 2021
Construction deadline

December 31, 2021
ESA CAM program end date

All projects must complete construction as set forth in their Project Approval Letter or the construction deadline, whichever comes first.
Phased Payment Policy

Revised Threshold
The qualifying incentive threshold reduced from $200,000 to $100,000.

Incentive Payment
Projects can receive up to 33% of the total incentive reservation at 50% project completion.

Requirements
Projects must receive written approval.
Project must install at least 1/3 of core measures.

<table>
<thead>
<tr>
<th>Core Measures</th>
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<tbody>
<tr>
<td>Comprehensive lighting scopes ≥ $20,000</td>
</tr>
<tr>
<td>DHW heaters and boilers</td>
</tr>
<tr>
<td>Heating and cooling systems*</td>
</tr>
<tr>
<td>Building envelope measures*</td>
</tr>
</tbody>
</table>
In response to COVID-19, ESA CAM is now offering virtual audits (pre-construction) and verification inspections (post-construction)

Virtual assessments are conducted via a software platform compatible with most smart devices. ESA CAM staff guide on-site personnel virtually through the assessment covering:

- Safety
- Videography best practices and techniques
- What data they’re looking for and the equipment/site components they’ll need to inspect over the video
Additionaly COVID-19 Resources

• ESA CAM Q2 2020 newsletter included COVID-19 resources (e.g., websites, webinars, etc.) for affordable housing properties

• Resources maintained on program website, www.esacommonarea.com

• Encourage project teams to share valuable resources with us, multifamilySPOC@TRCcompanies.com
Thank You

PG&E ESA CAM website
www.esacommonarea.com

Marissa Van Sant, ESA CAM Program Manager
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Questions
Thank You

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