



**Better Buildings Residential Network Peer
Exchange Call Series: *Moving Beyond Split-
Incentives: Engaging Rental Property Tenants
and Owners in Energy Efficiency (301)***

October 13, 2016

Call Slides and Discussion Summary

Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview
- Featured Speakers
 - **Stefen Samarripas**, Local Policy Analyst, American Council for an Energy Efficient Economy (*Network Member*)
 - **Raj Casper**, Assistant Training Center Director, Community Housing Partners
 - **Darren Port**, Building Energy Codes Manager, Northeast Energy Efficiency Partnerships (*Network Member*)
- Discussion
 - What opportunities can working with multifamily and rental properties offer for energy efficiency programs?
 - What challenges has your program encountered when working with renters and/or property owners?
 - What strategies have helped your program overcome challenges and improve outreach to renters and property owners?
 - What other questions or comments do you have about overcoming split incentives and working with renters and property owners?
- 2 ■ Closing Poll and Upcoming Call Schedule

Better Buildings Residential Network

Better Buildings Residential Network: Connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of homes that are energy efficient.

Membership: Open to organizations committed to accelerating the pace of home energy upgrades.

Benefits:

- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

Commitment: Provide DOE with annual number of residential upgrades, and information about associated benefits.

For more information or to join, email bbresidentialnetwork@ee.doe.gov, or go to energy.gov/eere/bbrn and click Join

Best Practices: American Council for an Energy Efficient Economy (ACEEE)

Reaching More Residents: Opportunities for Increasing Participation in Multifamily Energy Efficiency Programs

Lauren Ross, Michael Jarrett and Dan York

Stefen Samarripas
Local Policy Analyst, ACEEE
October 13, 2016

Presentation Overview

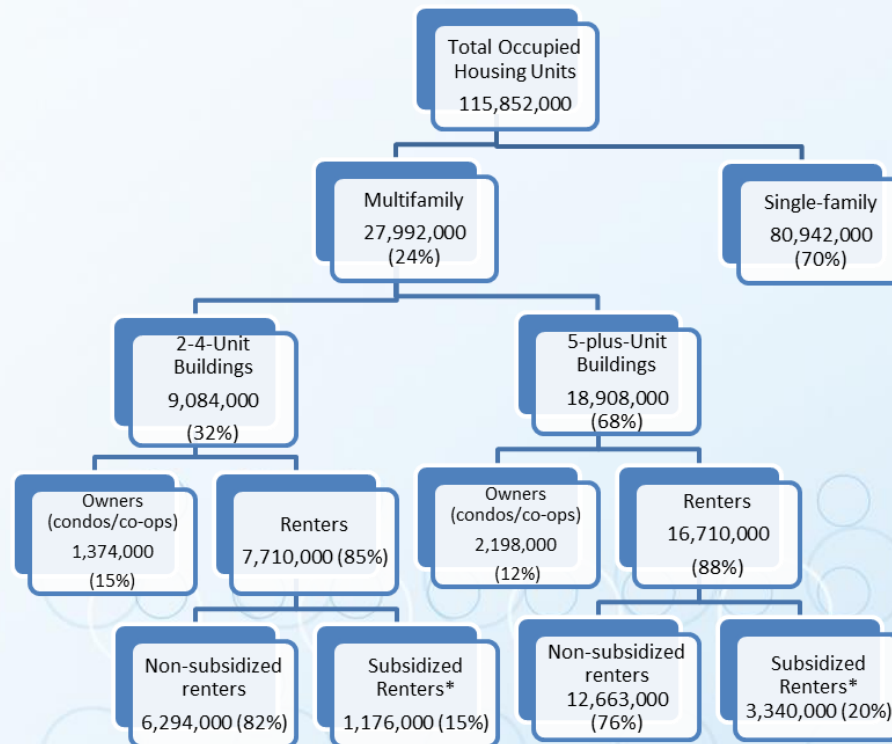
- Introduction to ACEEE
- Multifamily Market Overview
- Research Objectives
- Research Results
- Best Practices for Multifamily Programs

American Council for an Energy-Efficient Economy (ACEEE)

- Nonprofit advancing energy efficiency through research, policy, and technical assistance
- Policy program working at national, state, and local levels
- Local policy work:
 - *City Energy Efficiency Scorecard & Self-Scoring Tool*
 - Projects focused on energy efficiency in multifamily housing, community resilience and energy affordability
 - Technical assistance to local governments, utilities and community organizations
 - *Local Policy Toolkit*, policy calculator, and best practice research
 - www.aceee.org/portal/local-policy



The Multifamily Market



Challenges to Participation in Multifamily Programs

- Split Incentives
- Time and Resource Constraints
- Complex Decision-Making Structures
- Marketing and Outreach

Research Objectives

Compile participation and other program-level data

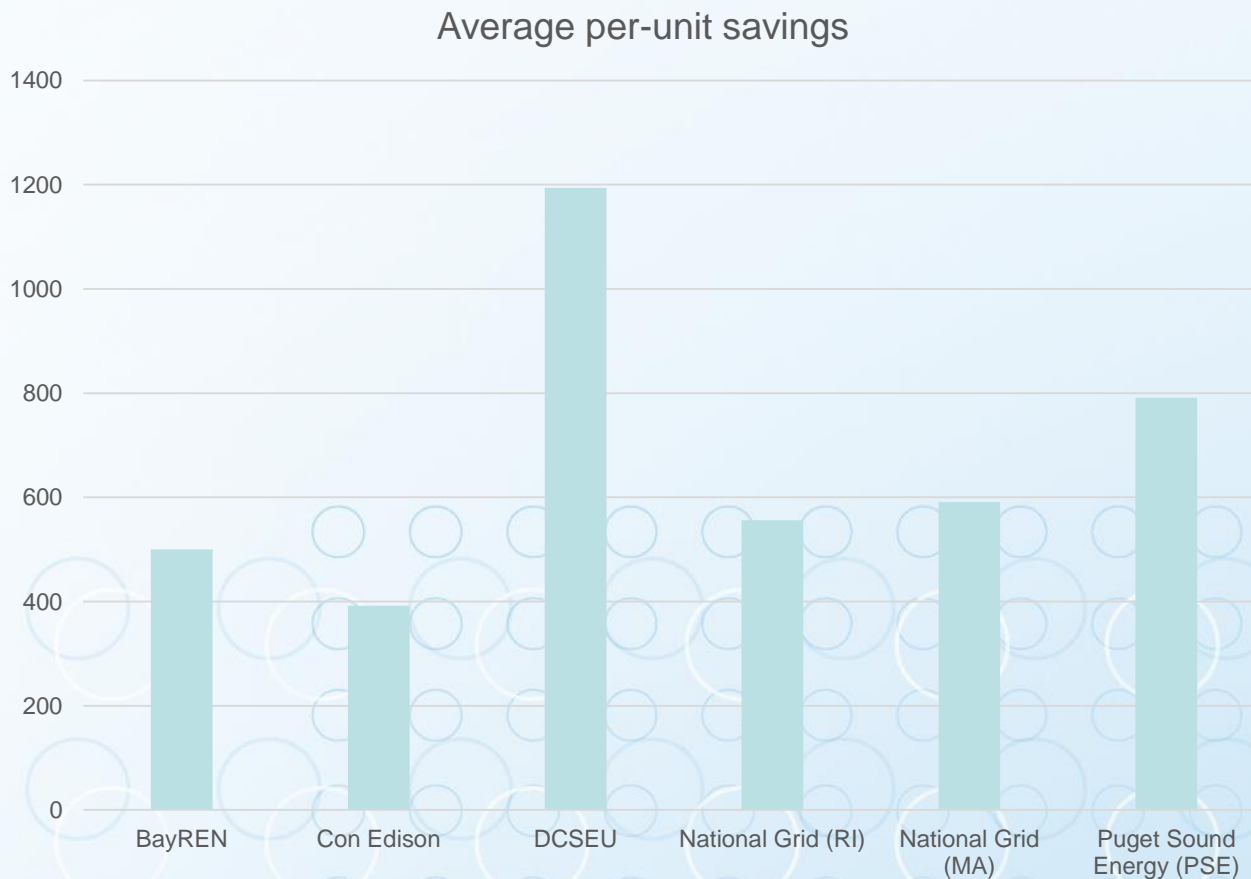
Identify best practices to increase participation

Provide useful data that will assist stakeholders

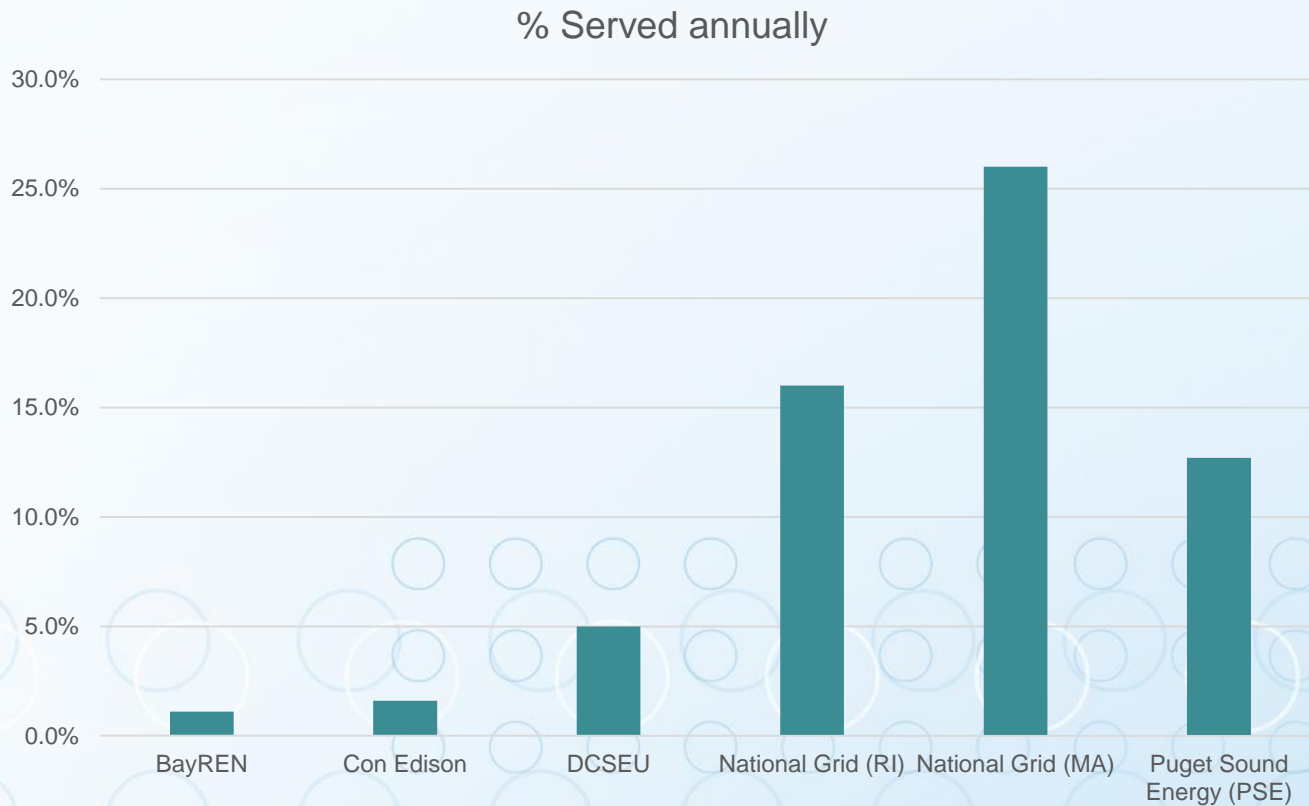
Program Comparison: Participation

- Annual participation: 1,724 units to 54,198 units
 - 1% to 26% of the estimated eligible customer base
- Cumulative participation: 25–50% for some programs
- Data limitations

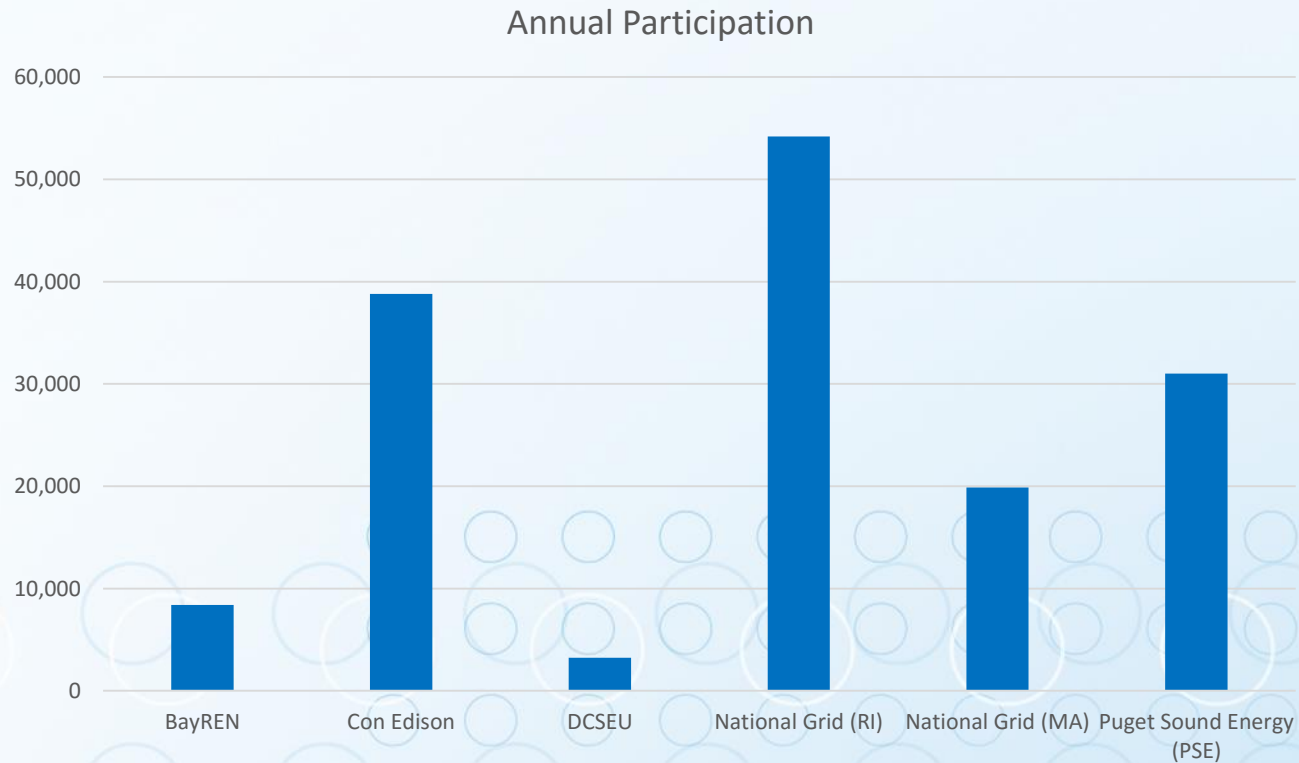
Program comparison (slide 1 of 4)



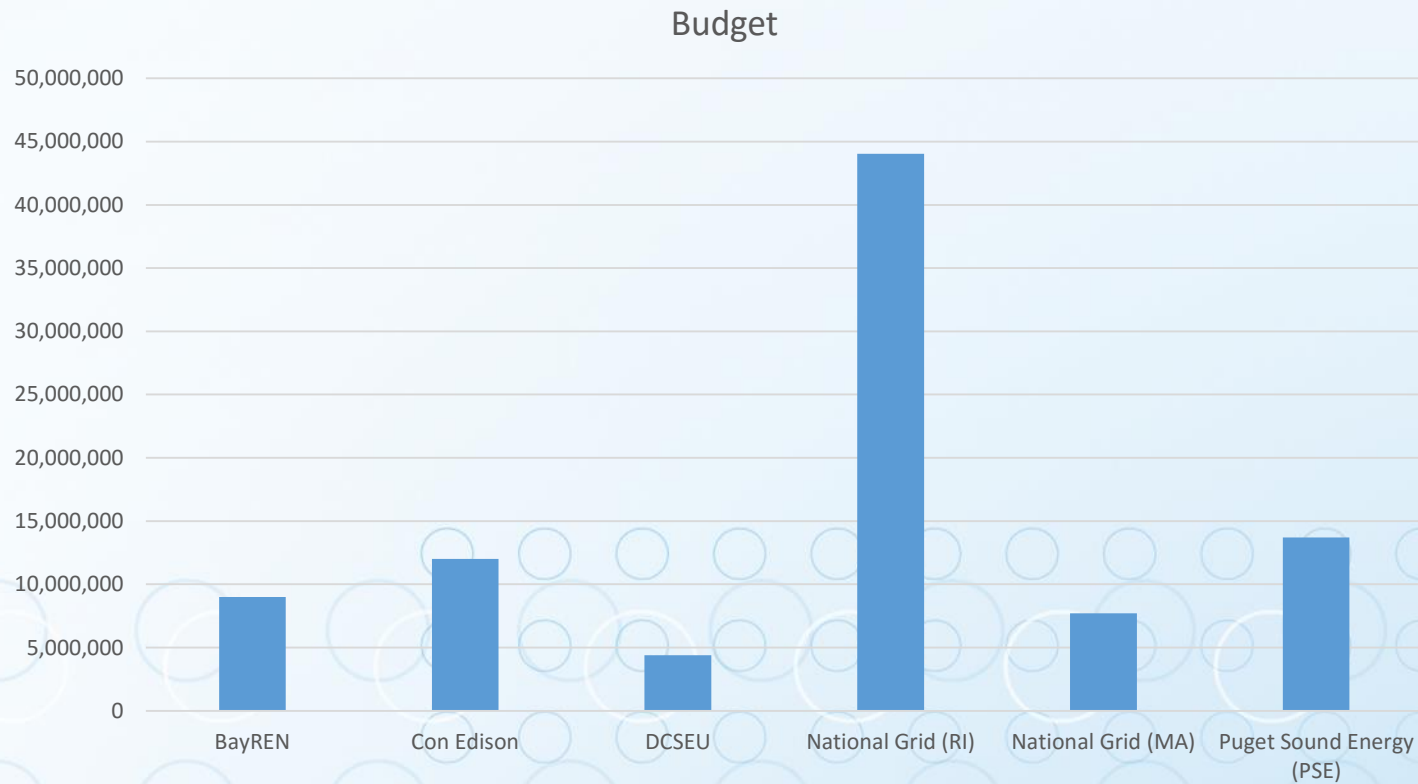
Program comparison (slide 2 of 4)



Program comparison (slide 3 of 4)



Program comparison (slide 4 of 4)



Best Practices

1. Simplify and Streamline Access to Program and Services

- Integrate opportunities for on-bill or other low-interest financing

2. Target Building Owners and Managers

- Owners and managers are the key multifamily decision-makers

3. Tailor Marketing and Outreach to Specific Segments of the Multifamily Market

- Understand the motivations, timelines and challenges of the sector you target

Best Practices

4. Partner with State and Local Housing Organizations to Market and Deliver Programs
 - Program incentives should complement those other organizations offer
5. Partner with Trade Allies to Market Programs
 - Trade allies know many multifamily owners and managers
6. Deliver Effective Messages that Demonstrate Clear Value with Actionable Guidance
 - Market the full range of non-energy benefits

Questions

Stefen Samarripas
ACEEE Local Policy Analyst
<http://aceee.org/multifamily-project>

Relevant Publications:

[Reaching More Residents: Opportunities for Increasing Participation in Multifamily Energy Efficiency Programs](#) (ACEEE)

[Apartment Hunters: Programs Searching for Energy Savings in Multifamily Buildings](#) (ACEEE)

[Engaging as Partners: Introducing Utilities to the Energy Efficiency Needs of Multifamily Buildings and Their Owners](#) (ACEEE)

[Program Design Guide: Energy Efficiency Programs in Multifamily Affordable Housing](#) (Energy Efficiency for All)

[PACENation Case Studies](#)

Presentation Highlights: ACEEE

- Unique considerations for multifamily housing:
 - **Marketing and Outreach:** Understanding the different sectors and their unique needs will go a long way to creating marketing messages that appeal to property owner timelines, and motivations. For example, owners may only be able to invest in upgrades during capital cycles.
 - **Simplify:** Create a one-stop-shop with a single representative contact that guides applicants through the process to minimize the hassle of multiple applications and requirements.
 - **Partnerships:** Get to know the incentive providers and financing opportunities in your area to maximize available funding for your program. Additionally, partnerships with housing authorities can help programs reach building owners and managers.

Lessons Learned: Community Housing Partners (CHP)



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CHP SMART Homes





- ▲ Introduction to Community Housing Partners (CHP)
- ▲ SMART Homes Program Overview
- ▲ Program Goals
- ▲ Highlights
- ▲ Results
- ▲ Positive Takeaways
- ▲ Opportunities for Improvement
- ▲ Current State of Program



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Who is CHP?

CHP SMART Homes

- ▲ Affordable housing non-profit based in Christiansburg, VA
- ▲ Footprint in six states
- ▲ Three primary business segments:
 - ▶ Real Estate Development
 - ▶ Energy Solutions
 - ▶ Housing Services

www.communityhousingpartners.org



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Program Overview

CHP SMART Homes



CHP
SMART HOMES

- ▶ Program piloted at three CHP properties in 2014
- ▶ SMART – Saving Money and Resources Together
- ▶ Behavior-based education program for residents



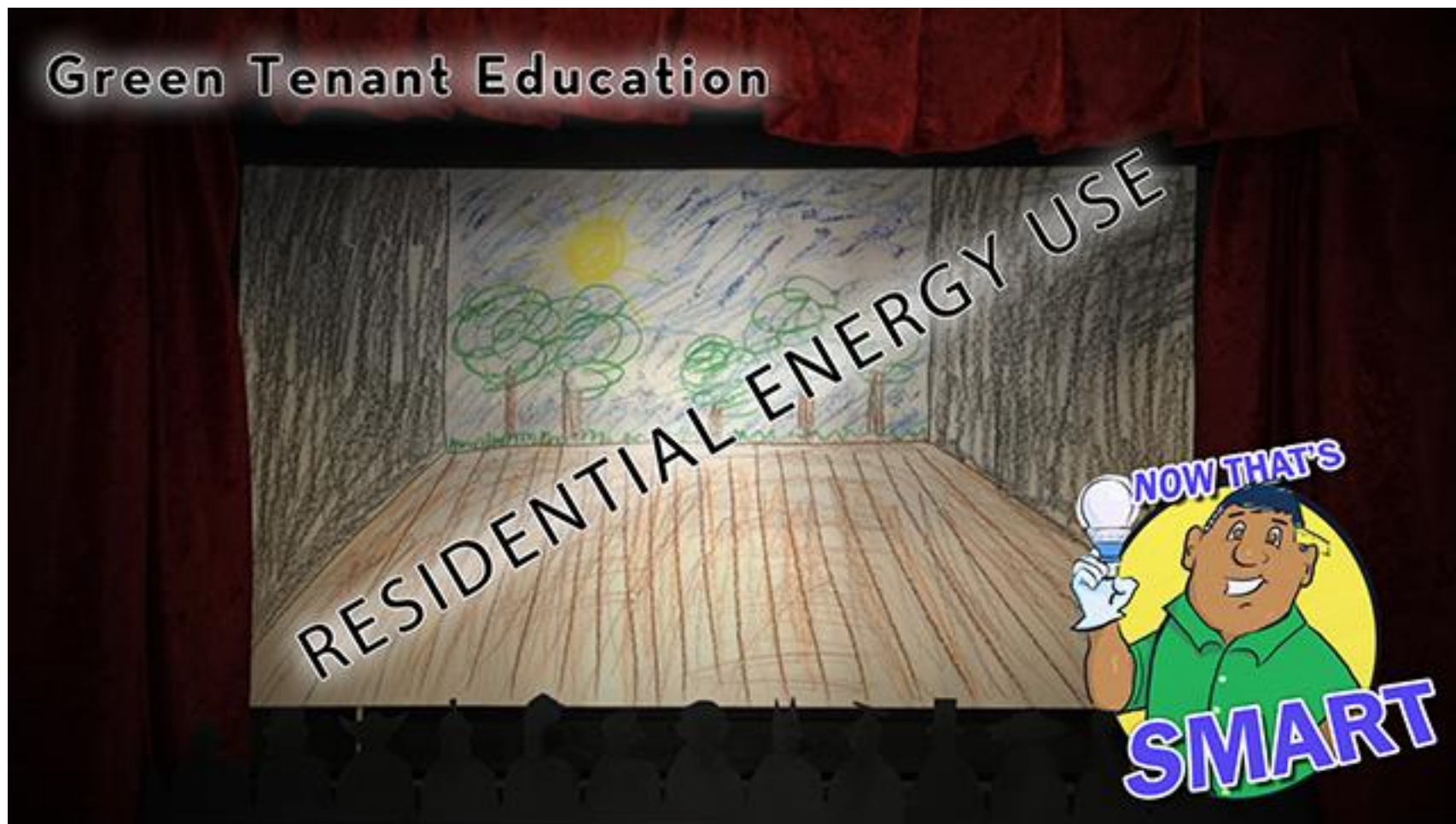
- ▶ Achieve energy consumption reductions across our portfolio through behavior change
- ▶ Develop effective curriculum to reach our residents
- ▶ Measure success through benchmarking energy data of units



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Highlights

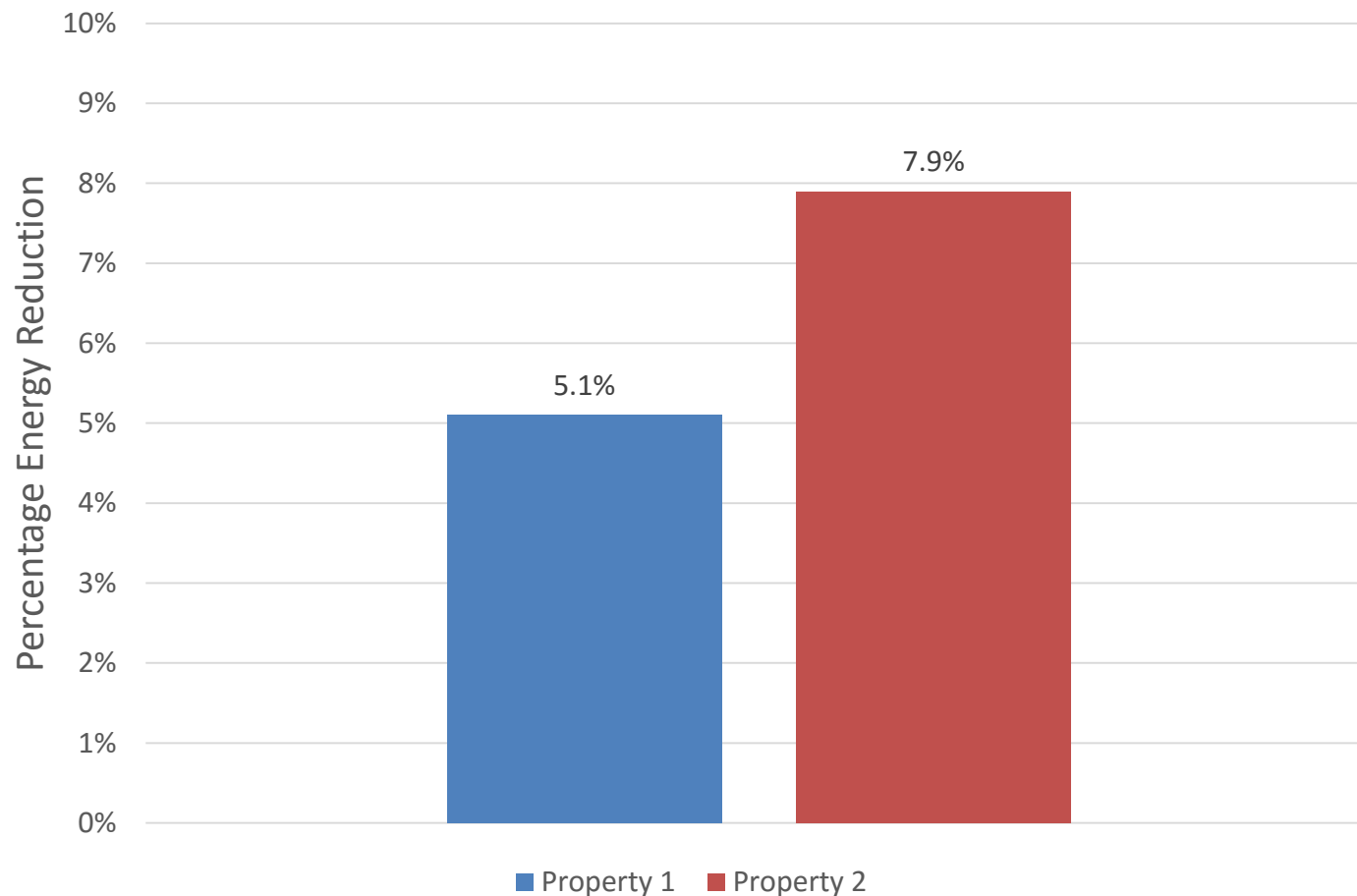
CHP SMART Homes





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Average Energy Reduction after Education





- ▶ Activities and video content worked well for kids
- ▶ Adults were more motivated by financial rewards and free items



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Opportunities for Improvement

CHP SMART Homes

- ▲ Improve internal communication between departments to coordinate program implementation
- ▲ Conduct hands-on walkthroughs of units
- ▲ Obtain more utility waivers from residents



- ▶ Implementing a modified youth summer program at one property
- ▶ Not currently tracking energy usage in relation to education received
- ▶ Partnering with Virginia Center for Housing Research at Virginia Tech to look at effectiveness of resident education on energy-related behaviors

Presentation Highlights: Community Housing Partners (CHP)

- The CHP pilot featured **educational materials** targeted at both adults and children, **free stuff and gift cards** for participation, and had tenants sign **utility waivers** to access energy use data.
- **Lessons Learned:**
 - **Educational materials do not compare to a walk through** to pinpoint opportunities for energy savings.
 - For deeper energy savings, programs can **require owners to participate in direct install in units** to access support for upgrades in common areas.
 - Obtaining signed utility waivers is paramount. **Without data, pilots are unable to accurately estimate the effects** of their efforts.

Tips and Tools: Northeast Energy Efficiency Partnerships (NEEP)



Northeast Energy Efficiency Partnerships

A Guide for Renting and Creating Lower Cost Energy Efficient Apartments and Homes

Darren Port
Building Energy Code Manager

October 13, 2016

About NEEP

Mission

Accelerate energy efficiency as an essential part of demand-side solutions that enable a sustainable regional energy system

Approach

Overcome barriers and transform markets via
Collaboration, Education and Enterprise

Vision

Region embraces **next generation energy efficiency** as a core strategy to meet energy needs in a carbon-constrained world



One of six regional energy efficiency organizations (REEOs) funded by the US Department of Energy (US DOE) to link regions to US DOE guidance, products and programs




A Guide for Renting and Creating Lower Cost Energy Efficient Apartments and Homes





What to Look for Before Renting

A Guide for Renting and Creating Lower Cost Energy Efficient Apartments and Homes

Nearly all renters pay their own energy bills, but few have options relating to the efficiency and quality of the heating and cooling systems, appliances, and windows of their rental. However, there are many steps renters can take to save and manage energy. Just because you don't own your home doesn't mean comfort, energy and cost savings cannot be achieved.

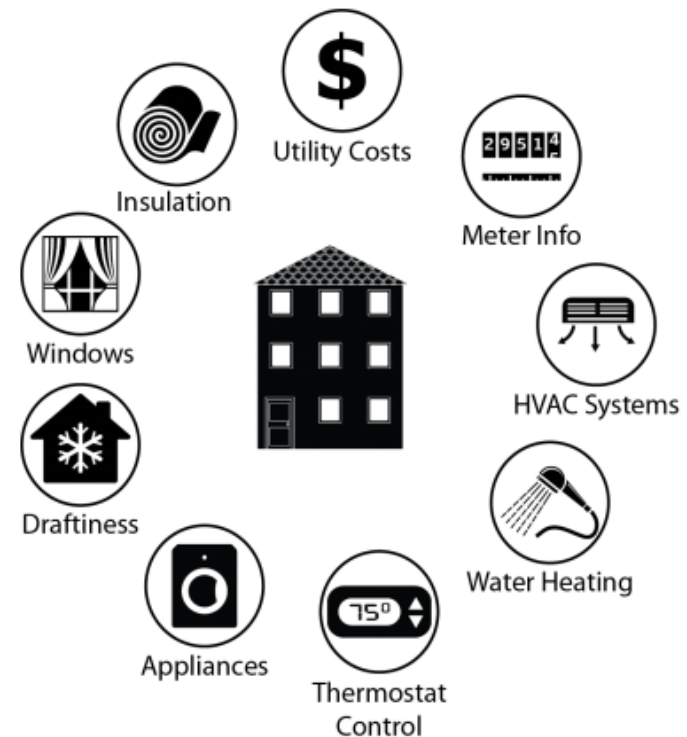
 Energy spending per square foot in rented apartments can run 76 percent higher than in owner-occupied single family homes.¹

 **Looking for a rental property?** A few key indicators can help you assess the efficiency of the rental. Below is information on “**What to Look For**”, and a checklist of features to investigate “**Before You Sign**” when touring a potential new home or apartment. The checklist will assist you in understanding the amount of energy you may use and ultimately pay for.

 **Looking to cut energy bills in your current rental?** It's natural to think that it's not worthwhile to invest in energy efficiency improvements if you don't own your home. However, there are steps you can take that pay off within a year or two and improvements that you can also bring with you to your next home. Use the “Simple Low-Cost and No-Cost Measures” and “Utility Program Offerings” sections at the end of this guide to reduce your bills quickly.

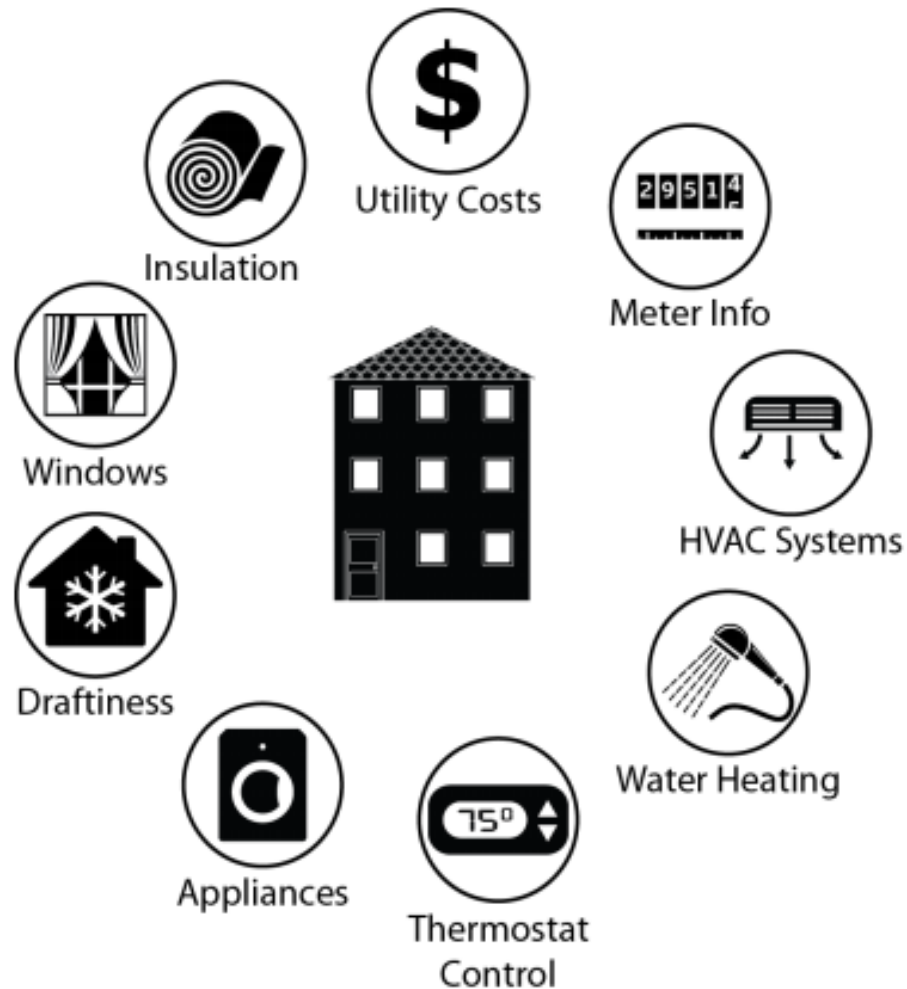
What to Ask and Look for Before Renting

Saving money and energy can be easy if you know what to look for. Thoroughly investigate the many energy use aspects of a potential rental before you sign a lease.



What to Ask and Look for Before Renting

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Before You Rent Checklist

Before You Rent Checklist			Property Address		
System	✓	Notes	System	✓	Notes
Metering			Heating Equipment		
Individually Metered			Age of System		
Master Metered			Type of Fuel		
Utility Cost			Equipment Location		
Landlord Pays Utilities			Water Heating Equipment		
Renter Pays Utilities			Age of Water Heater		
Type of Utilities			Age of System		
Gas			Equipment Location		
Oil			Appliances – Age & Condition, ENERGY STAR?		
Water			Oven		
Electric			Dishwasher		
Internet/Cable TV			Refrigerator		
Thermostat Control			Washer/Dryer		
Programmable Thermostat			Notes:		
In-Unit Thermostat					
Hallway Thermostat					

Before You Rent Checklist



Before You Rent Checklist			Property Address		
System	✓	Notes	System	✓	Notes
Air Infiltration & Insulation			Other		
Building Insulated/Air Sealed			Ample Outlets		
Unit Insulated/Air Sealed			Cable/TV/Phone Connection		
Air Leakage – Inspect for drafts & gaps			# of light fixtures, type of bulb – CFL, LED		
Inspect Fireplace Damper			Natural Light		
Windows			Energy Ratings / Certifications:		
Single Pane					
Double Pane					
Triple Pane or more					
Storm Windows					
Screens			Notes:		
Safety					
Carbon Monoxide and Smoke Detectors					
Fire Extinguisher					

NEEP Multifamily Resources

NEEP Resources:

- [NEEP Multifamily Retrofit Online Resource Center](#)
- [Multifamily Program Matrix](#)
- [Renter's Guide to Green Real Estate](#)
- Report: [Increasing Energy Efficiency in Small Multifamily Properties in the Northeast](#)

Coming Soon:

- Regional Energy Efficiency Organization (REEO) collaborative report on barriers and opportunities in multifamily retrofits

Save the Dates!

NEEP High Performance Schools Summits



OCTOBER 21

On October 21 at Rhode Island College, join superintendents, school business officials, architects, engineers, facility and energy managers, and other educational stakeholders to share lessons learned and best practices for successful school improvement projects.

[Agenda, Logistics & More >>](#)



NOVEMBER 9

Join architects, engineers, facility and energy managers, utility program administrators, school business officials and others for an interactive summit focused on exploring the multiple benefits of high performance schools and making the business case for your next school project.

[Agenda, Logistics & More >>](#)

Home Energy Labeling Index (HELIX) Summit

Boston - November 10

THANK YOU!



Darren Port

91 Hartwell Avenue Lexington, MA 02421

www.neep.org



Presentation Highlights: Northeast Energy Efficiency Partnerships (NEEP)

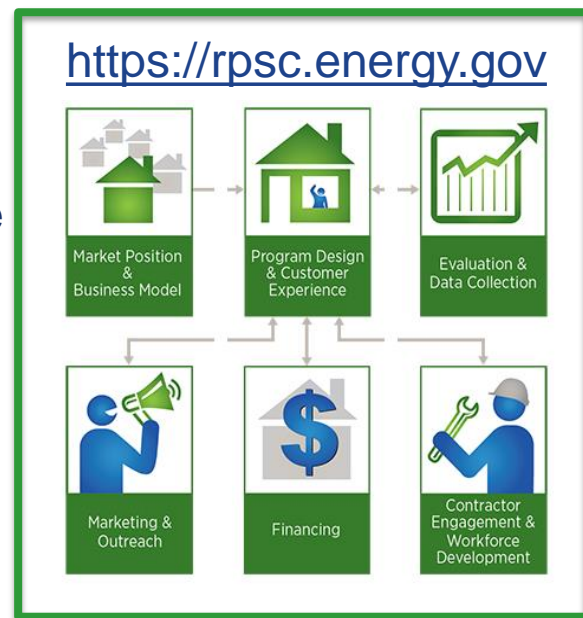
Although many energy upgrades are beyond the reach of a tenant, there are a few ways **tenants can push energy efficiency**:

- Bringing an energy checklist to an initial viewing can motivate landlords to make energy efficiency upgrades to be competitive with other rentals.
- Although the housing market can be competitive in larger urban areas, the willingness of landlords to run through an energy checklist may reflect their responsiveness and concern for tenant wellbeing throughout a lease.
- Tenants can band together to influence building management to implement deeper upgrades.

Related Resources in the Residential Program Solution Center

Explore resources related to engaging rental property tenants and owners in energy efficiency:

- Explore the [Program Design & Customer Experience – Assess the Market](#) handbook for understanding how to engage and motivate this market sector.
- [The Southeast Multifamily Market Assessment](#) explores the opportunity to capture energy savings in this share of the region's housing market.
- Learn about [Boulder, Colorado's SmartRegs initiative](#) to help the city meet carbon reduction goals and improve the quality, safety, & marketability of the rental housing stock.
- Consider Harvard University's research on the need and potential for [Reducing Energy Costs in Rental Housing](#).



- While you're there, see the latest [Proven Practices](#) post on [Leveraging Partners to Provide Training and Develop a Skilled Workforce](#).
- The Solution Center is continually updated to support residential energy efficiency programs—[member ideas are wanted!](#)

Spread the Word!

Do you have new staff in your organization that might benefit from Peer Exchange Calls?

Network Members, such as VEIC, inform their new employees of upcoming calls to spread the knowledge and grow the network!

New staff can sign up to receive upcoming call information. To do so, email bbresidentialnetwork@ee.doe.gov, or visit energy.gov/eere/bbrn and click Join

Peer Exchange Call Series

We hold one Peer Exchange call the first four Thursdays of each month from 1:00-2:30 pm ET

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation

Upcoming calls:

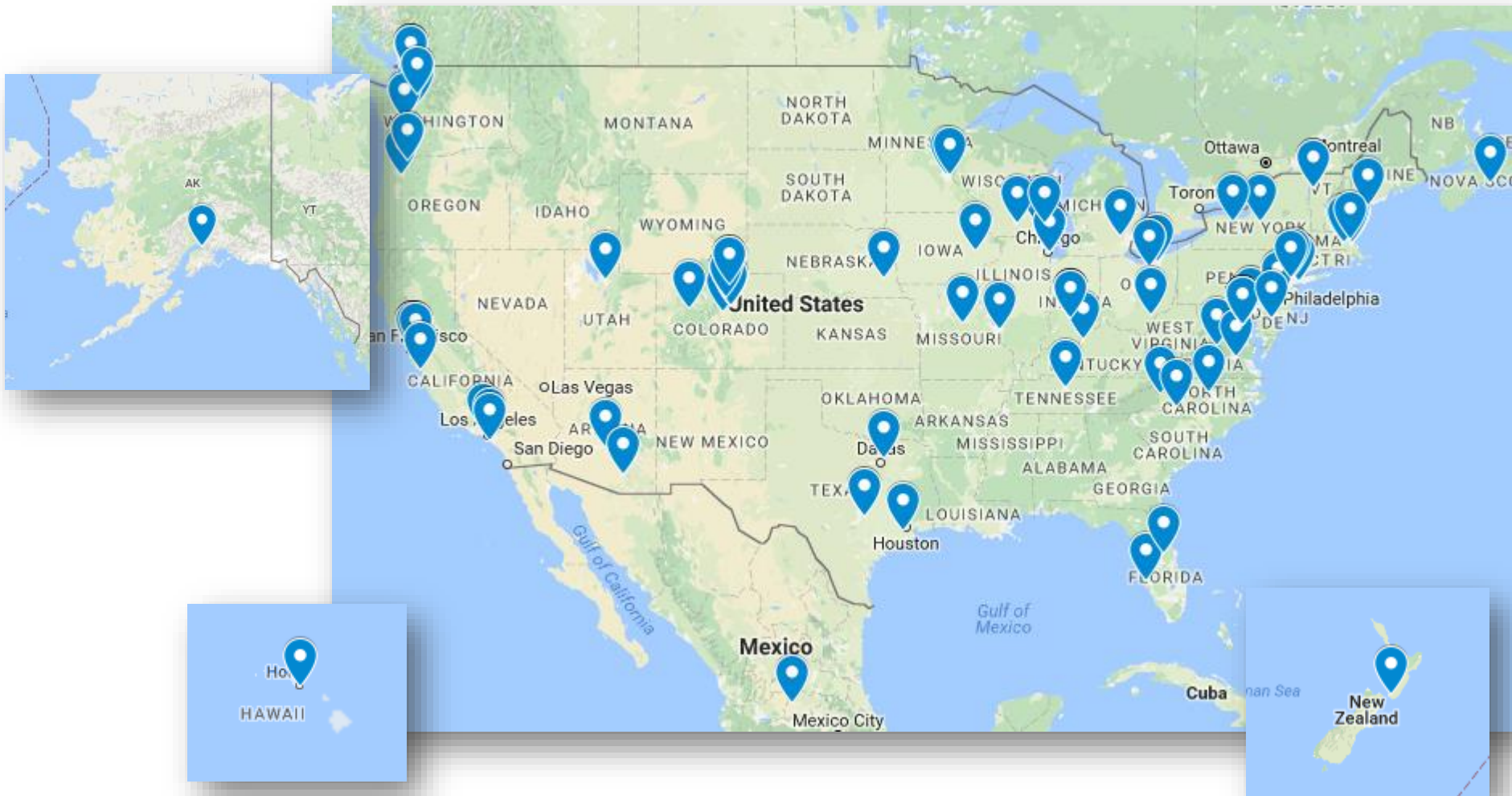
- November 10: Do You Hear Me Now? Communicating the Value of Non-Energy Benefits (101)
- November 17: Diversifying Funding Sources and Building New Revenue Streams (201)
- *November 24: No Call – Thanksgiving*
- December 1: America's Next Top Energy Model: Tools and Best Practices (101)

Send call topic ideas to peerexchange@rossstrategic.com

See the Better Buildings Residential Network Program [website](#) to register

Addenda: Attendee Information and Poll Results

Call Attendee Locations



Call Attendees: Network Members (1 of 2)

- American Council for an Energy-Efficient Economy (ACEEE)
- AppleBlossom Energy Inc.
- Arlington County Government
- Center for Energy and Environment (CEE)
- City of Aspen Utilities and Environmental Initiatives
- City of Bellevue
- City of Charlottesville
- City of Chula Vista Conservation Section
- City of Fort Collins
- City of Kansas City
- City of Plano
- CLEAResult
- Cleveland Public Power
- Duke Carbon Offsets Initiative
- Efficiency Nova Scotia
- Energy Efficiency Specialists
- Fort Collins Utilities
- Fujitsu General America Inc.
- Group14 Engineering Inc.
- International Center for Appropriate and Sustainable Technology (ICAST)
- Michigan Saves
- Midwest Energy Efficiency Alliance (MEEA)
- Mitsubishi Electric Cooling and Heating
- Monroe County Environmental Quality and Sustainability

Call Attendees: Network Members (2 of 2)

- National Housing Trust/Enterprise
- New York State Energy Research and Development Authority (NYSERDA)
- Northeast Energy Efficiency Partnerships (NEEP)
- Stewards of Affordable Housing for the Future
- U.S. Department of Energy (DOE)
- Vermont Energy Investment Corporation (VEIC)
- Wisconsin Energy Conservation Corporation (WECC)

Call Attendees: Non-Members (1 of 3)

- Affordable Community Energy Services Company
- Alaska Housing Finance Corporation
- Association for Energy Affordability
- BA Consult
- Bam Superior Solutions
- BKi
- Blue Ridge EMC
- BRANZ
- Brendle Group
- Build It Green
- California Public Utilities Commission
- Cascade Natural Gas
- City of Bloomington Utilities
- Codman SQ NDC
- Columbia Water and Light
- DC Sustainable Energy Utility
- Delaware Division of Energy and Climate
- Energy Resources Group
- Enhabit
- FMC Facility Management Consultores
- Focus on Energy
- Franklin Energy Services
- GoodCents
- Groundswell
- Hawaii Energy
- Holy Cross Energy

Call Attendees: Non-Members (2 of 3)

- United States Housing and Urban Development
- ICF International
- Illume Advising LLC
- LINC Housing
- Lincoln Electric System
- Mercy Housing
- Minnesota Pollution Control Agency
- MPower Oregon
- Oberlin Municipal Light & Power
- Opportunity Council/ Community Energy Challenge
- OR Dept of Energy
- Preferred Properties of California
- Resynergy Systems
- Retrofit Baltimore-Civic Works
- Richmond Region Energy Alliance
- Sarasota County
- Seattle City Light
- Snohomish PUD
- Snugg Home
- South Burlington Energy Committee
- Sparhawk Group
- SPEER
- Sunowner Inc
- Sustainable Connections
- The Oberlin Project
- The Renaissance Collaborative
- Tennessee Valley Authority
- UpGrade Athens County
- U.S. EPA

Call Attendees: Non-Members (3 of 3)

- Utah Governor's Office of Energy Development
- Ventacity Systems, Inc
- VHR+a
- WA State Energy Office
- WSU Energy Program

Opening Poll

- Which of the following best describes your organization's experience with engaging rental property tenants and owners in energy efficiency?
 - Some experience/familiarity – **50%**
 - Limited experience/familiarity – **23%**
 - Very experienced/familiar – **19%**
 - No experience/familiarity – **7%**
 - Not applicable – **1%**

Closing Poll

- After today's call, what will you do?
 - Seek out additional information on one or more of the ideas – **76%**
 - Consider implementing one or more of the ideas discussed – **16%**
 - Make no changes to your current approach – **8%**
 - Other (please explain) – **0%**