

Redesigning multifamily incentives to center renters <> equity

CCEC

Part 2

June 13, 2023



Who/what is StopWaste?

- Founded 1976 as ACWMA, 2013 Energy Council approved as a JPA
- Countywide public agency with 17 member agencies representing Alameda County, its 14 cities, and 2 sanitary districts
- We help ALCO businesses, residents, and schools waste less, recycle properly and use water, energy and other resources efficiently
- Administers the BayREN Multifamily (BAMBE) and Green Labeling programs



Who/what is BayREN?

- Founded 2013, collaboration of 9 Bay Area counties partnering to promote resource efficiency focused on energy, water and greenhouse gas reduction
- RENS have unique directives to fill gaps that utilities are not serving, develop programs for hard-to-reach communities, and pilot innovative and scalable initiatives.



BAMBE to date

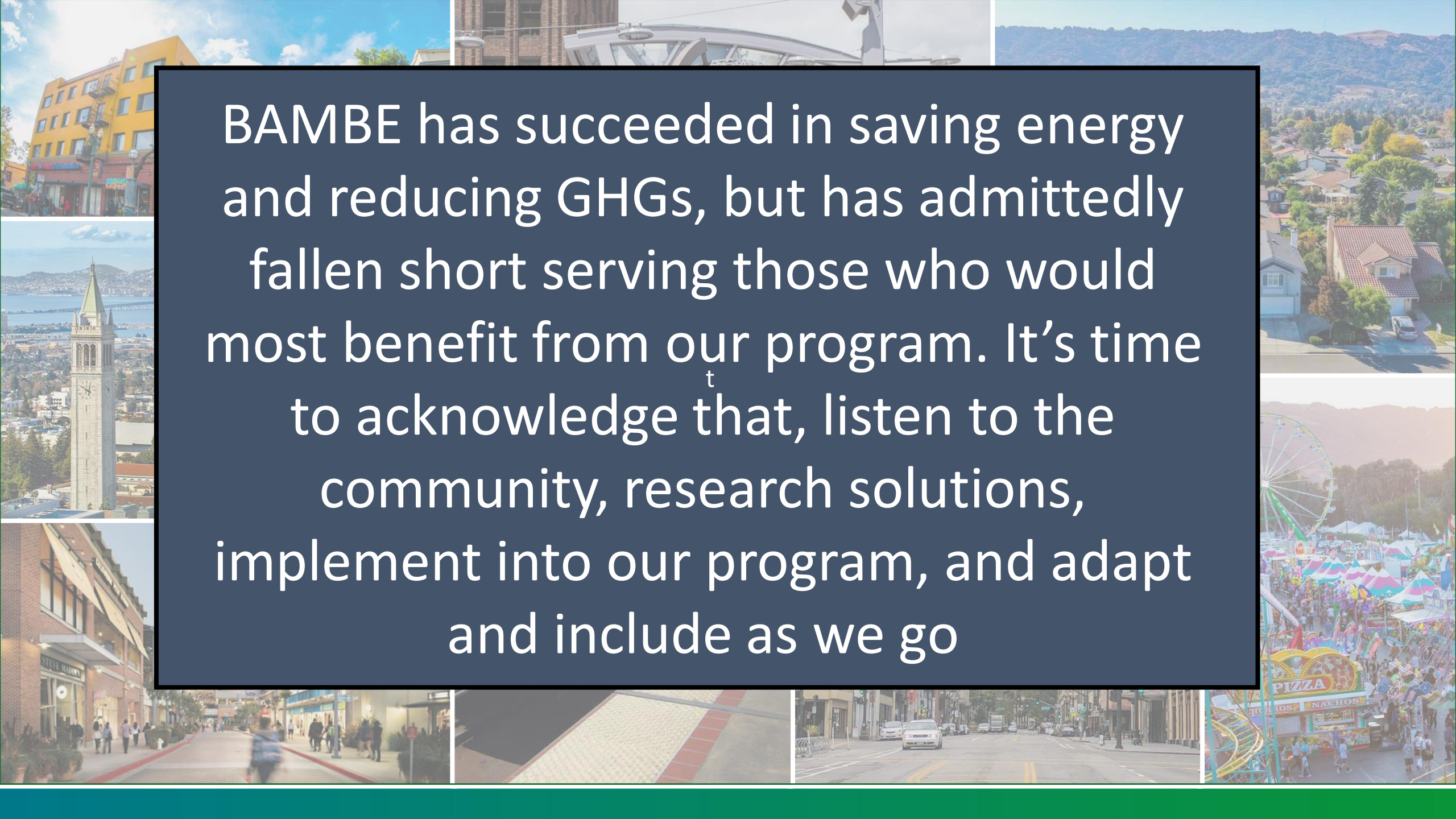
- Program launched in 2014, longest running MF program in CA
- No-cost energy consulting/TA and significant incentives
- Upgraded 45k+ units across 600+ multifamily properties, over 5% of Bay Area MF building stock
- \$34+ million in direct rebates
- Mostly served deed-restricted or higher end market rate rental, NOT unsubsidized affordable housing (UAH, aka NOAH)
- No requirement for prevailing wage, pick your own licensed contractor



(Current) Bay Area MF Program Landscape

- Mix of existing program and recent influx of new programs, all EE and electrification
- High potential for customer confusion, BUT also for collaboration!
- Implementation complexity leading to reduced effectiveness and increased costs
- Need for state level coordination (MF-HERCC)



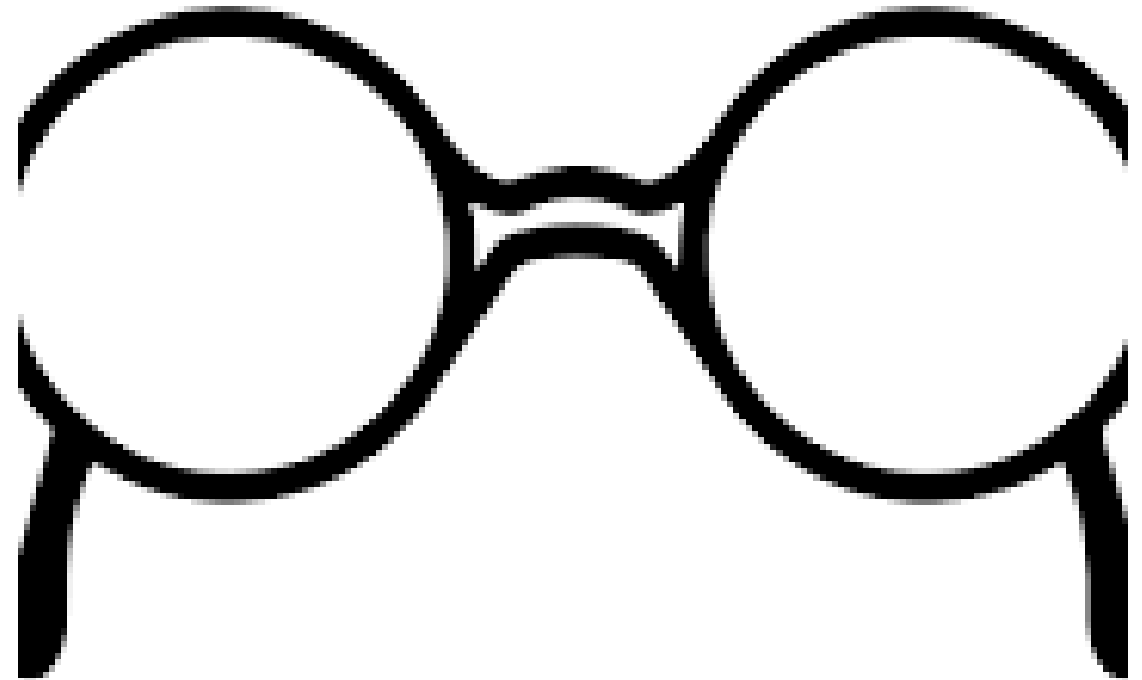


BAMBE has succeeded in saving energy and reducing GHGs, but has admittedly fallen short serving those who would most benefit from our program. It's time to acknowledge that, listen to the community, research solutions, implement into our program, and adapt and include as we go

2023 Incentive Redesign

Centering equity

1. Identifying specific building upgrades offered through BAMBE that can reduce burdens experienced inequitably throughout the region,
2. Providing higher incentives for properties located in those overburdened regions when the scope of work includes upgrades that can reduce the impact of those burdens,
3. Providing higher incentives for in-unit measures that improve comfort and safety for properties located in regions that have historically been “underserved” by energy efficiency programs.



Incentive Structure

- OLD: \$750 per unit 10% savings achieved by minimum 3 measures, with separate pathway for electrification*
- NEW**

Basic Package	Rebate	Amount	Eligible Measures
	Base	\$500 per unit	All eligible energy efficiency measures



Adders and multipliers

Adder	Description	Data used
Electrification	Additional incentives are offered for gas-to-electric upgrades that result in reduced GHG emissions.	NA
Health Burden	Properties in specific “Health Burdened” geographic zones will receive additional incentives for in-unit upgrades that improve indoor air quality.	Asthma rates Air pollution
High Heat/Resilience	Properties in specific “High Heat Burdened” geographic zones will receive additional incentives for in-unit upgrades that help residents be more resilient to extreme heat events.	High heat days Percent impervious surface
Housing Burden	Properties in specific “Housing Burdened” geographic zones will receive additional incentives for certain in-unit upgrades.	Housing burden (ACS, CES4.0)

Eligibility Tool

BAMBE Eligibility Tool

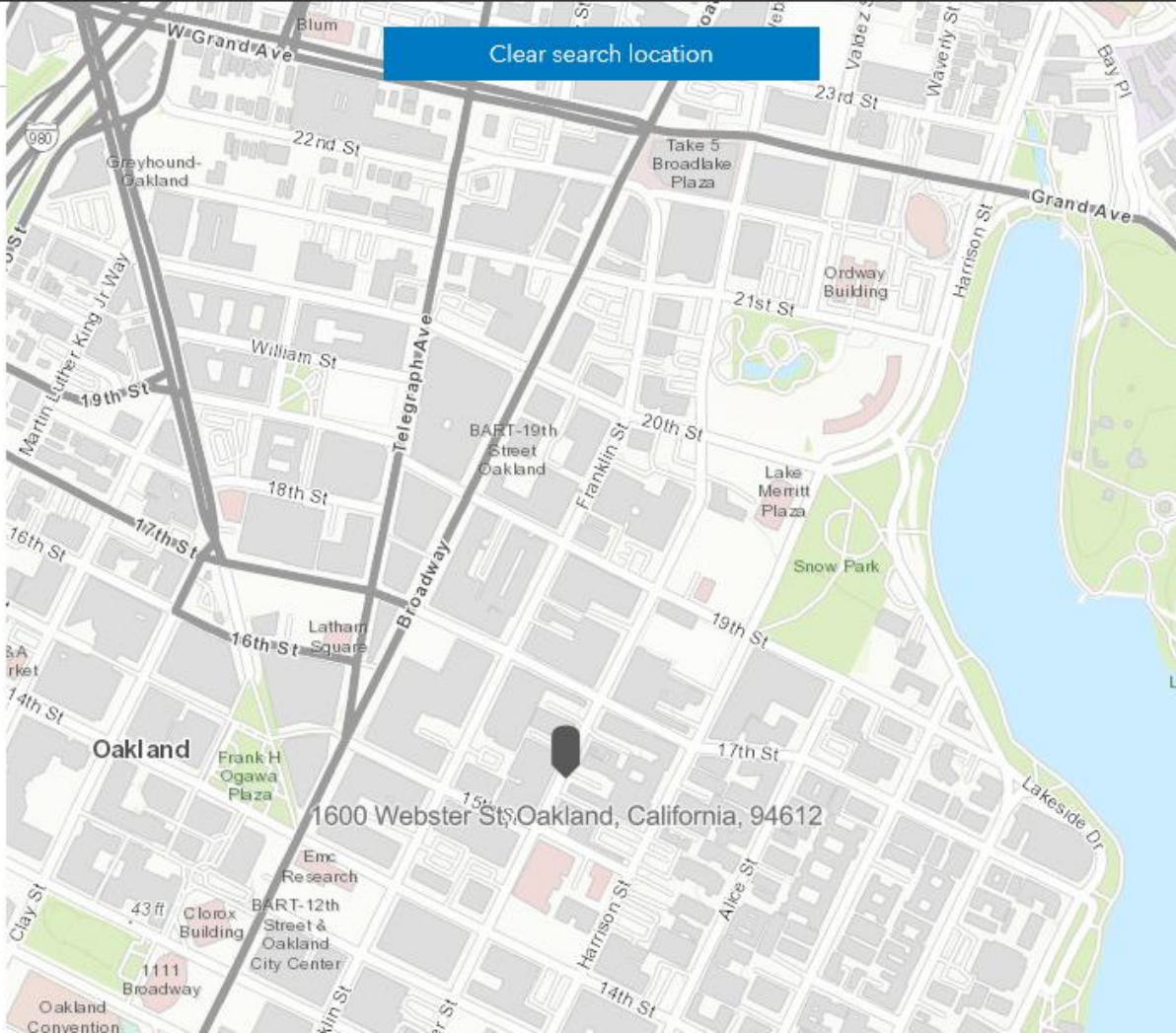
1600 Webster St, Oakland, CA, 94612, USA

Results:1

Rebate and Adder Eligibility

Gas Provider	Pacific Gas & Electric
Electric Provider	Pacific Gas & Electric
Base Rebate	Eligible (\$500/unit)
Electrification Adder	Eligible
Health Burden Adder	Eligible (\$500/unit)
Heat Burden Adder	Not Eligible
Housing Burden Multiplier	Eligible (1.5-2x rebate multiplier)

Clear search location



Electrification Adder

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
	Panel Upgrades	\$1000 per unit for subpanel & \$5000 /property for central/common area

Health Burden Adder

Eligibility	Eligible Measures	Rebate Amount
Only properties located in “Health Burdened” priority zone	Windows	\$500/ unit
	In-unit Heat Pump HVAC (MSHps/ PTHPs)	
	In-unit Laundry Dryer	
	In-unit Electric Cooking	
	Residential Heat Pump Water Heater	

High Heat Burden/Resilience Adder

Eligibility	Eligible Measures	Rebate Amount
Only properties located in “Heat Burdened” priority zone	Windows	\$500/ unit
	In-unit Heat Pump HVAC (MSHps/ PTHPs)	
	Wall Insulation/ Attic Insulation/ Roof Insulation/ Crawlspace Insulation/ Floor Insulation/ Cool Roof	

Housing Burden Multiplier

Eligibility	Eligible Measures	Rebate Amount
Only properties located in “Housing Burdened” priority zone AND Has <50 units and built pre-2010, or deed-restricted affordable property	A) 1.5x increase to total rebate OR 2X increase if scope includes wall insulation and/or window upgrades	
	B) Up to \$500 reimbursable per unit for refrigerators, dishwashers, in-unit washing machines, lighting, in-unit duct sealing, in-unit duct insulation, and/or smart thermostats	

2023 uptake to date (TA provided)

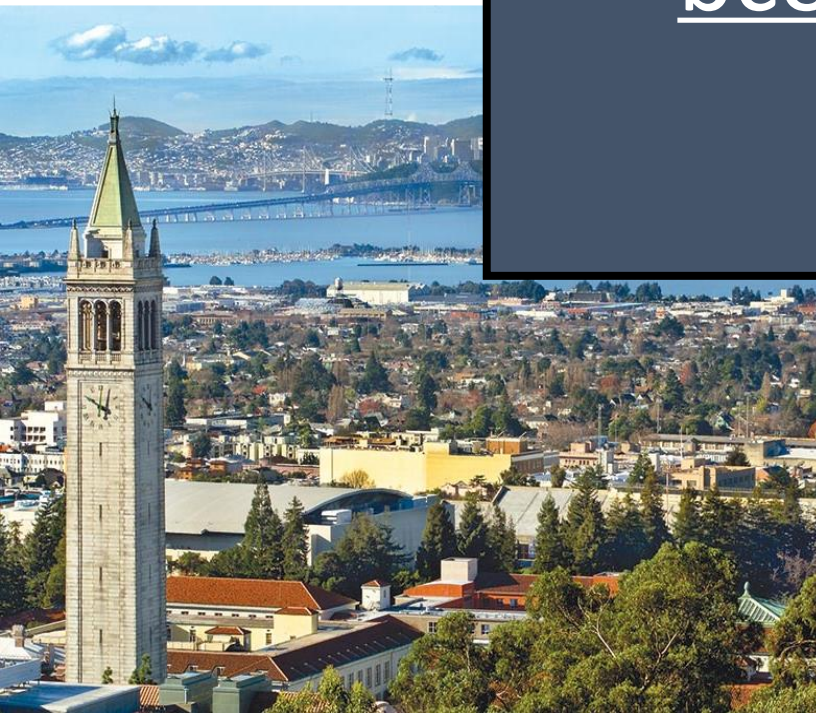
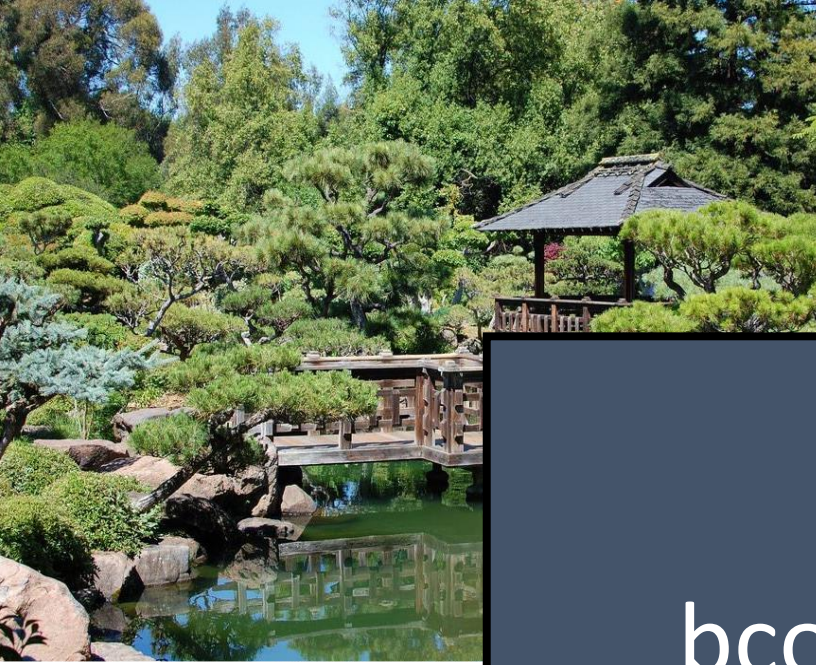
- High lead volume coming out of pandemic, interest in electrification
- 55 projects, 1474 units
- >\$2mil in incentive



Striving for....

- Fund non-energy maintenance and repairs to increase pride and sense of place, fund landscaping/permaculture to connect residents to land
- Better/more granular tracking of who we're serving
- Keep movin' on up!





Thank you!

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510-891-6511



Solar on Multifamily Affordable Housing

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

Marisa Villarreal (she/her), SOMAH Program Director

California Climate and Energy Collaborative Forum

June 12, 2023



What Sets SOMAH apart?

First of its kind

1. Pioneering **inclusion** of economic, environmental, and community development
2. **Single program administrator** creates advances in accessibility
3. Designed to **prioritize tenants** and **dedicated to equity**
4. All nonprofit administration team¹



1. SOMAH Program Administrators include: Association for Energy Affordability, Center for Sustainable Energy, GRID Alternatives, and the California Housing Partnership Corporation.

Making Renewable Energy Accessible

Why We Need to Change Access to Solar

Decreasing solar costs

- Becoming more common in middle to high-income households

Less accessible to low-income households

- In 2018, only 15% of solar adopters were low-income households
- Low-income households spend larger portion of income on home energy costs

Less access for low-income multifamily renters

- Aren't the decision makers

Low access rates in communities of color and Tribal Nations

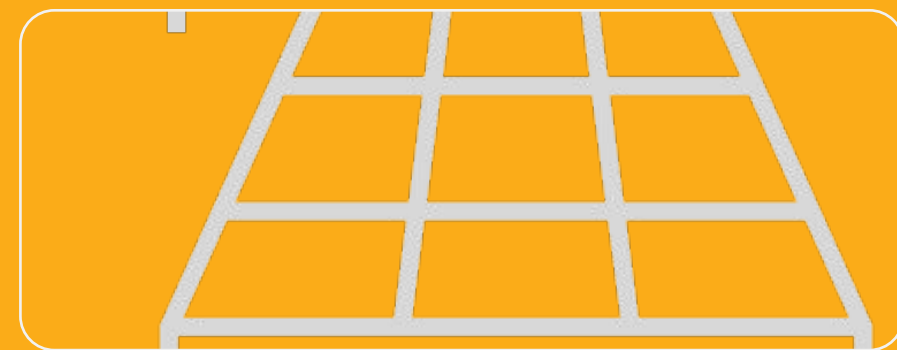
- Need to close the gap between who has access to and who benefits from solar

Building Equity Into Policy & Programs with SOMAH

SOMAH's Goals



Incentivize solar adoption on multifamily affordable housing



Install **300 megawatts** of generating capacity **by 2030**



Contribute to economic development through **tenant savings and paid job training** (local & targeted hiring)



Increase energy efficiency + **offset emissions**

Increasing Access

- Minimum **51% of financial benefit** goes to reduce tenant energy bills
- Over **35%** of applications are in **environmental justice communities (DACs)***
- **Required job training** on each project
 - Goal of **50%** of trainees be **Local** OR **Targeted Hires***

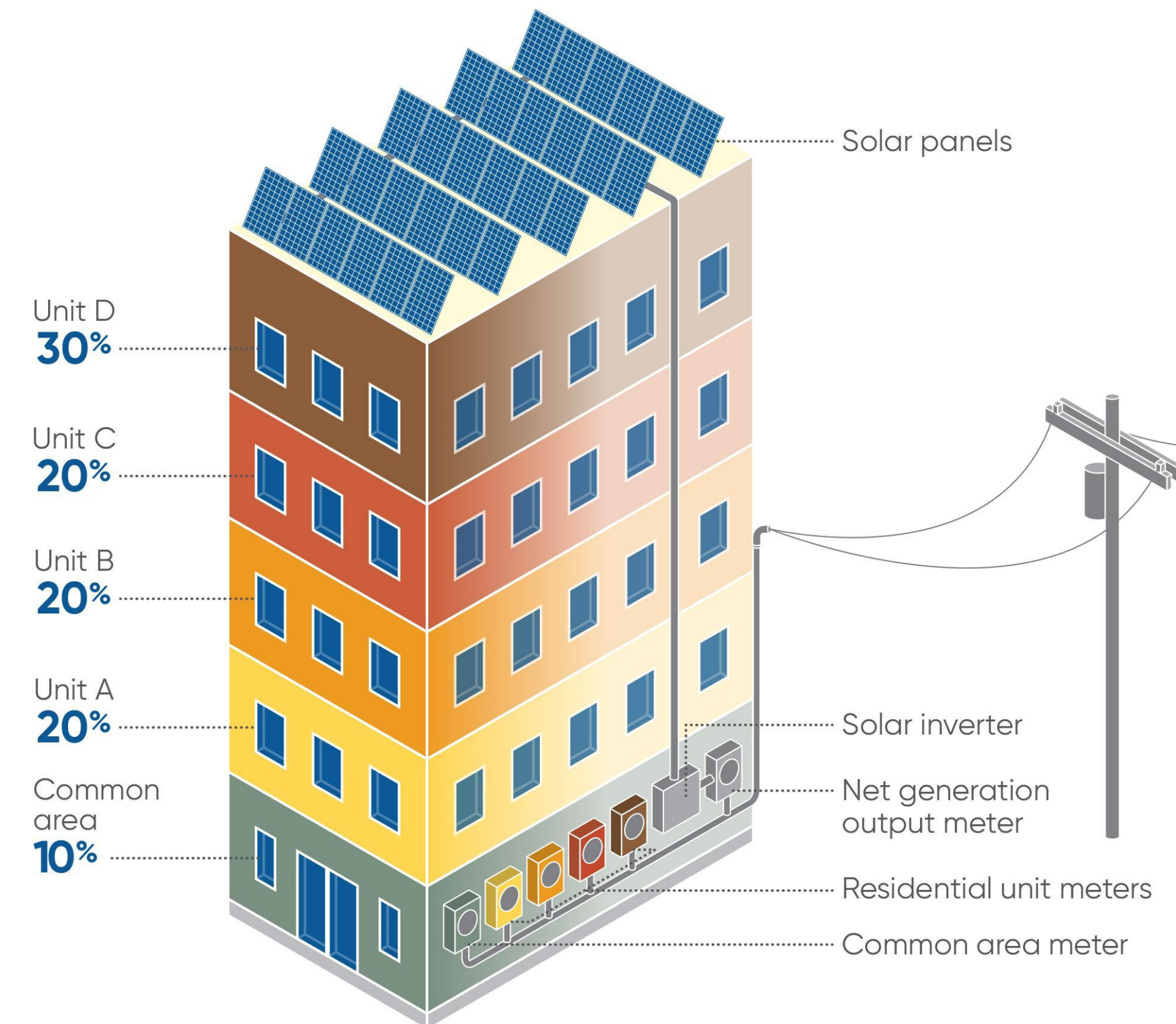
*DACs are defined by [CalEnviroScreen](#), SB 535

*Hires are Residents, women, black and indigenous people of color, justice-impacted, single parents, facing barriers to employment



SOMAH-eligible properties

- Properties with at least 10 years of affordability restrictions remaining
- At least 5 tenant units with individual meters
- One of the following:
 - 80% of property residents have incomes at or below 60 percent of the area median income (**AMI**)
 - Property is located in a defined **disadvantaged community (DAC)** that scores in the top 25% of census tracts statewide in the CalEnviroScreen



No-Cost Technical & Support Services

Technical assistance (TA) is a **free service offered to all SOMAH participants** at any time of the project process



TechAssist@calsomah.org

Average Project Snapshot

Average Property Size

81 units

Average System Allocation

87% Tenant

13% Common Area

Average System Size

174 kW

Tenant Savings

77% - 88% savings on utility bills

\$45 - \$61 per month

Avg.	#
Project Cost	\$665,143
SOMAH Incentive	\$363,941
System Size (kW)	~189 kW
SOMAH offsets ~54% of the project cost	

Addressing barriers to participation

- Increasing install costs + SOMAH's annual "step-down" of incentives became a financial barrier
- Removed step-down and increased to Year 1 rates
- **Higher incentives are now available!**
- Looking forward to seeing impact of new IRA/ITC adders

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

Building Equity Into SOMAH

- SOMAH's origins: Created through advocacy of **EJ orgs and solar industry**
- Direct **economic benefits** for **renters** baked in via VNEM
- **Tenant education** and outreach requirements
- **Workforce development** requirements, with local and priority hiring



Building Equity Into SOMAH

- Community-based organizations as **partners**
- **Advisory bodies** (11-member Advisory Council and 9-member Job Training Org Task Force) and **public forums**
- No-cost **technical assistance**
- **Consumer protection** via bidding tool



Lessons from SOMAH

- Partners, not saviors
- Tribal participation is a specific and unique challenge
- Marketing plan needs to be well-funded and designed to proactively reach your target communities
- Comarketing and other program leveraging to maximize benefits to participants
- Take a proactive approach to addressing barriers to participation



A high-angle photograph of two solar installers on a residential roof. The installer on the left wears a white hard hat with 'ANGEL' on it, an orange safety vest, and a dark long-sleeved shirt. The installer on the right wears a white hard hat, glasses, a brown hoodie, and a yellow safety harness. They are both looking at a large solar panel that is being positioned on the roof. The background shows a suburban neighborhood with green lawns, trees, and a parking lot filled with cars. A semi-transparent dark grey rectangle is overlaid on the bottom left of the image, containing the title and list.

Partnering with SOMAH

- Partnership in outreach efforts
- Co-marketing/co-branding on materials, websites
- Incorporation into programming



Marisa Villarreal, Program Director

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www.CalSOMAH.org

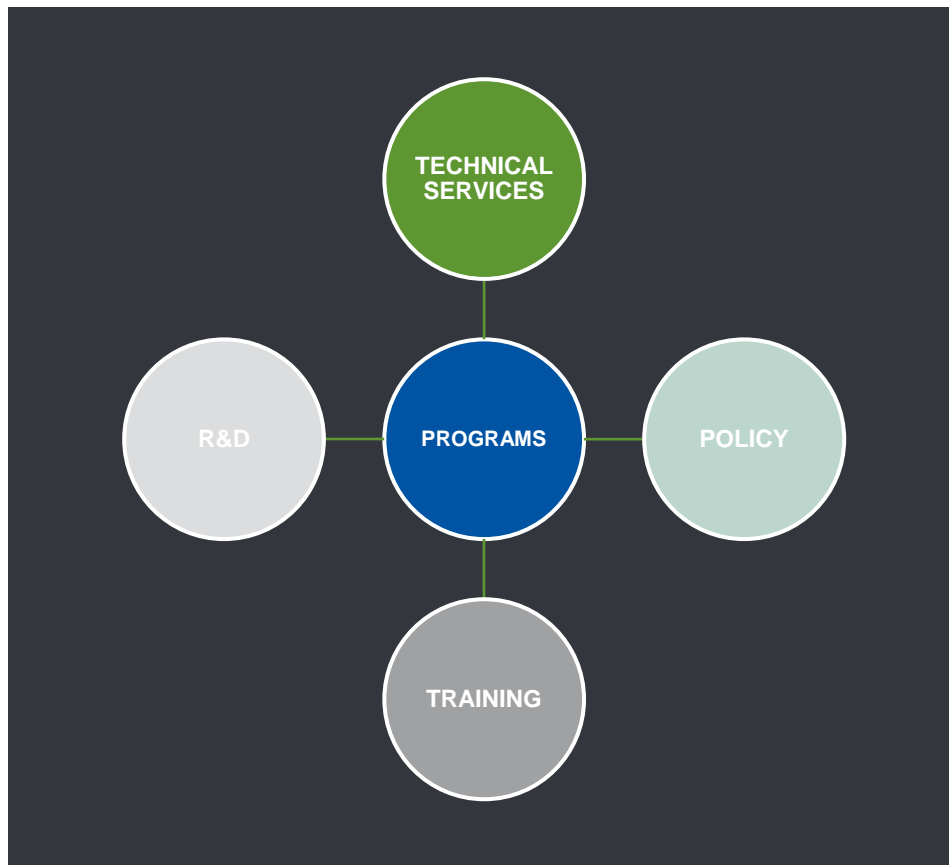
Association for Energy Affordability

*Bringing the benefits of clean energy
& energy efficiency to underserved
communities*

June 13, 2023

Sheetal Chitnis
Senior Manager, Programs
schitnis@aea.us.org

HOW WE DO IT



Research & Demonstration



REALIZE-CA: Mass Deployment Model for Zero Carbon Retrofits



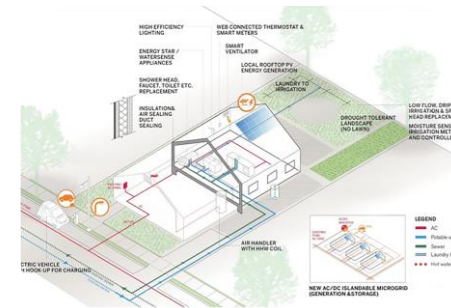
Large Capacity Central CO2 Heat Pump Study



Prefabricated Envelope Solutions for California Low-Rise Buildings



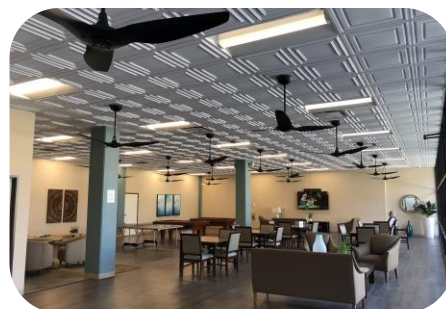
Low GWP Mechanical POD



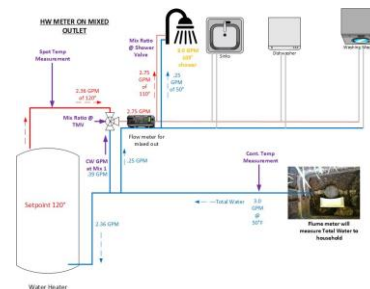
Oakland Ecoblock: ZNE, Low Water-Use Retrofit Neighborhood



Advancing Indoor Air and Environmental Quality Technologies- IAQ Impacts of Gas Cooking



Smart Ceiling Fans & Communicating Thermostats to Provide Energy-Efficient Comfort



Domestic Hot Water Draw Study



Multifamily Building Air Tightness Characterization



DOE Advanced Building Construction Collaborative

Policy

Coalition Memberships & Participation

Energy Efficiency for All (EEFA)

- EEFA connects climate, health, and equity by bringing energy efficiency to affordable housing.



The Building Decarbonization Coalition (BDC)

- BDC unites building industry stakeholders with energy providers, environmental organizations and local governments to power our nation's homes and workspaces with clean energy.

Federal Electrification Policy Coalition

- Policy & Energy Burden Sub-Groups

State & Local Regulatory and Legislative Advocacy Efforts in New York & California





Training the Multifamily Workforce & Industry

- Building Operators
- Energy Consultants & Auditors
- Contractors / Trades
- Building Operators
- Architects, Engineers, Design Professionals
- Policy Makers & Program Administrators



Utility

Existing Buildings

California Public Utility Commission (CPUC)

- **Solar on Multifamily Affordable Housing (SOMAH)**



Sacramento Municipal Utility District (SMUD)

- **Multifamily Electrification Program**



Marin Clean Energy (MCE)

- **Multifamily Energy Efficiency Program**
- **Low Income and Families (LIFT)**
- **Workforce Education and Training Program**



Los Angeles Department of Water & Power

- **Comprehensive Affordable Multifamily Retrofits (CAMR)**



City of Palo Alto

- **Multifamily Electrification Program**



Pacific Gas & Electric (PG&E)

- **WatterSaver**



New Construction

Southern California Edison (SCE)

- **Energy Savings Assistance Program New Construction**



Federal, State & Local Government

Existing Buildings

Community Services and Development Agency (CSD)

- **Low Income Weatherization Program (LIWP)**



Bay Area Regional Energy Network (BayREN)

- **Bay Area MF Building Enhancements Program (BAMBE)**



South Coast Air Quality Management District

- **Multifamily Affordable Housing Electrification Program (MAHEP)**



Three County Regional Energy Network (3CREN)

- **Multifamily Electrification Program**



California Public Utilities Commission

- **Technology & Equipment for Clean Heating (TECH)**



New Construction

California Energy Commission

- **Building Initiative for Low Emissions Development (BUILD)**



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New Construction

California Energy Commission

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Low Income Weatherization Program (LIWP)



LIWP - Program Overview

- Whole building energy efficiency, solar thermal, and solar PV for multifamily properties under a single program
- Offers financial incentives, property assessments, work scope development, construction management assistance, and quality control
- All measures that result in greenhouse gas (GHG) reductions are eligible
- EE incentives (including solar thermal) are based on the amount of GHGs reduced
- PV incentives are based on the size of the PV system



Energy Efficiency



Solar Photovoltaics



Building Electrification

LIWP - Eligibility Criteria

- One building with at least 5 units or have 20 total units on the property
- 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, BAMBE, 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

LIWP - Required In-unit Upgrades

Measure Category	Measure Type	
Water Heating	Low flow kitchen aerators	<1.8gpm 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
Lighting and Appliances	Replace all incandescent and halogen bulbs with LED equivalent	If applicable
	Replace any refrigerator manufactured before 1999 rated 750 kWh annual consumption or more	



LIWP – Possible Upgrades

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



LIWP – Incentives

EE Program Incentives	Tenant Energy Savings Measures	Owner Energy Savings Measures
FY 21-23	\$4,500 per MT GHG	\$3,000 per MT GHG

Solar PV Program Incentives	Tenant Meter PV Systems < 100 kW*	Owner Meter PV System <100 kW* (Common Area or Master Meter)
FY 21-23	Up to 100%	Up to 50%

* Solar PV Incentive is based on:

- Type of leveraged funds (LIHTC, ITC, LADWP) – the more leveraged funds, the less LIWP funding is needed. Projects are assumed to take ITC
- If PV system is offsetting owner meter or tenant meter consumption
- Size of PV system



TECH Clean California: Multifamily (TECH: MF)



TECH:MF - Eligibility Criteria

- All existing residential buildings qualify
- Multifamily: property with 5 or more dwelling units where multiple replacements are occurring at once **and** installations at buildings with 4 or fewer dwelling units served by a central system
 - Campuses with multiple individual single-family homes all operated by single entity would also be considered multifamily
- The heat pump appliance must be **replacing** an **existing non-heat pump heating source**
 - Dual fuel systems are allowed. However, to qualify, the system must a 3-component AHRI tested system.

TECH:MF – Incentives

Heat Pump HVAC Systems Serving Individual Apartments

Previous Space Heat Source	System Type		Total Incentive Per System
	Description	AHRI Test Standard	
Non-heat pump systems	Split or rooftop heat pump (ducted or ductless)	210/240	\$2,000
All except PTHPs	PTHP*, SPVHP*, or unitary through the wall/ceiling heat pump	310/380, 390	\$500 (Single or two-stage compressor) \$1,000 (Variable capacity/inverter-driven)

* PTHP: Packaged Terminal Heat Pump; SPVHP: Single Package Vertical Heat Pump

Heat Pump HVAC Systems Serving Multiple Apartments

Previous Space Heat Source	System Type	Total Incentive Per Apartment Served
Non-heat pump systems	HP HVAC equipment serving multiple apartments	\$1,000

TECH:MF – Incentives

Heat Pump HVAC Systems Serving Common Areas

Previous Space Heat Source	System Type	Total Incentive Per System
Non-heat pump systems	Split or rooftop heat pump (ducted or ductless)	\$1,800
	PTHP*, SPVHP*, or unitary through the wall/ceiling heat pump	\$300 (Single or two-stage compressor) \$800 (Variable capacity/inverter-driven)

* PTHP: Packaged Terminal Heat Pump; SPVHP: Single Package Vertical Heat Pump

Multifamily Heat Pump Pool or Spa Heating

Previous Heater Source	System Type	Total Incentive Per System
Non-Heat Pump	Heat pump pool heating	\$2,500

TECH:MF – Incentives

Unitary Heat Pump Water Heaters

Previous Water Heater Source	HPWH Tank Size	Total Incentive Per System
Gas/Propane	< 55 gallons	\$1,400
	≥ 55 gallons	\$2,100
Electric Resistance	All	\$700

Central Heat Pump Water Heaters

Previous Water Heater Source	HPWH Storage Volume*	Total Incentive Per System
Gas/Propane	< 17 gallons per bedroom served	\$1,200
	≥ 17 gallons per bedroom served	\$1,800

*Storage volume only includes storage volume of water that can be heated directly by the heat pump components of the plant

TECH:MF – Incentives

Electrical Panel Upgrades

Previous Equipment	System Type	Incentive / Apartment Receiving Electrical Upgrade
Undersized apartment electrical infrastructure that is upgraded as part of an apartment's HPWH or HP HVAC installation	Apartment panel or subpanel upgrades	\$1,400 Apartment unit must have received a TECH-funded HP HVAC and HPWH and <u>must be all-electric after the upgrade</u>

Additional Resources

- [LIWP interest form](#)
- [TECH MF Equipment requirements](#)
- [TECH MF Reservation form completion guide](#)
- [TECH MF Budget and incentive caps](#)
- [TECH MF Contractor knowledge Base](#)
- [AEA Electrification knowledge hub](#)



Maple Gardens



Maple Gardens – Scope of Work

- Wall Insulation
- Attic Insulation
- Windows
- Comprehensive LED Upgrades
- Low-flow Showerheads, Aerators and Toilets
- Refrigerators
- Induction Cooking Ranges
- In-unit Heat Pump Water Heaters
- In-unit Ducted Heat Pump HVAC



Maple Gardens – Incentives & Project Cost

Program Name*	Incentives (\$)
BAMBE	\$70,300
LIWP	\$93,750
TECH MF	\$88,500
SOMAH**	\$14,000***
Total Incentives	\$266,550

* Additional funding through USDA RD loans and HCD Serna (no tax credits)

** Approx. \$62,000 to SunRun through SOMAH

*** Developer fee from SunRun to Eden

Measures	Project Cost (\$)
EE + Electrification*	\$560,000
Solar PV	\$0**
Total Cost	\$560,000

* Includes material, labor and electrical costs

** Power Purchase Agreement

Maple Gardens

Special thanks to:

- Staci Givens, AEA – Lead TA
- Samantha Meyers, Eden – Owner
- Kelly Barsam Kelly, Buena Vista Construction – General Contractor
- Solar Installer – SunRun
- Program Administrators – LIWP, BAMBE, TECH and SOMAH

Thank You!

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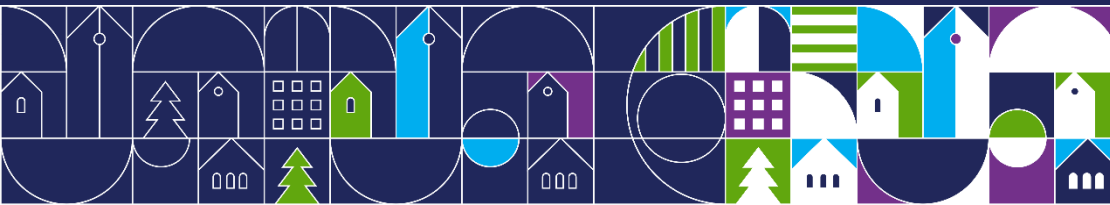
510.270.2375





CASE STUDY: MAPLE GARDENS

CCEC Forum
Emma Barker (she/her)
June 13, 2023





OUR MISSION

Eden Housing creates and sustains high-quality affordable housing communities that advance equity and opportunity for all.

165+ properties | 11,000+ homes | 25,000+ residents





MAPLE GARDENS

- In Gilroy, CA
- 18 units of affordable farmworker housing
- Mix of 2 and 3 bedrooms
- Built in the 1980s
- Rehab funded with USDA RD loans and HCD Serna (no tax credits)





REHAB SCOPE



- Exterior replacements of repair of siding, weather barriers, windows and trim
- Community spaces repaired and upgraded
- In-unit improvements include upgraded floors, bathrooms, and kitchens
- Energy and water efficiency improvements





ELECTRIFICATION

- Going all electric!
- Conversion of heating systems, boilers, gas stoves, and clothes dryers to high-efficiency electric appliances
- Adding air conditioning as part of heat pump HVAC
- Piloting induction stoves
- Electric service upgrades
- Layered LIWP, BAYREN, TECH and SOMAH





SOLAR

- Solar Services Agreement (SSA)
- 95% site electricity generated on-site
- Tenants receive ~\$45 credit per month on their PG&E bill
- No cost to developer, owner or tenants ever
- SunRun provides Eden a developer fee





ELECTRIFICATION CHALLENGES

- PG&E coordination and scheduling
- Timeline: long application periods and limited availability
- Electrical upgrades
- Impacts on relocation





TRANSITIONING TO INDUCTION

- Organizational education and engagement
- Demonstrations
- Resident engagement
- Focus on the benefits!
- Providing cookware
- Positive resident response!





COMMUNITY ENGAGEMENT

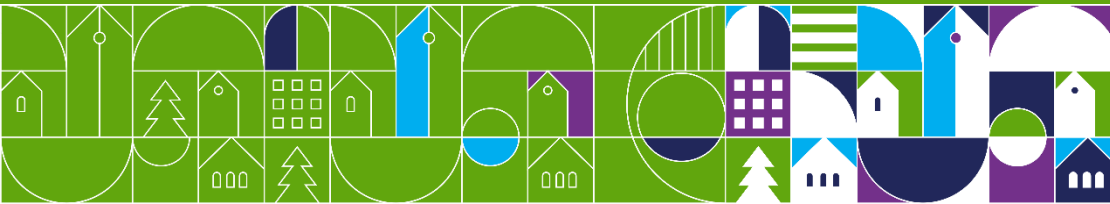
- Early and often!
- Resident meetings
- Pamphlets and FAQs translated
- Selling the benefits
- Value of a strong management team





MAPLE GARDENS LESSONS LEARNED

1. You don't need to be an expert (or know much at all)!
2. There are lots of incentives, which will bring down costs
3. Programs can benefit both owners/operators and tenants
4. Consider your electrical load when electrifying
5. Use technical assistance!





Thank you!

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Samantha Meyer (she/her) | Samantha.meyer@edenhousing.org

Senior Project Developer | Eden Housing

