



Multi-Family Program

CY2018 Process Evaluation Results

NAVIGANT

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Peoples Gas
North Shore Gas

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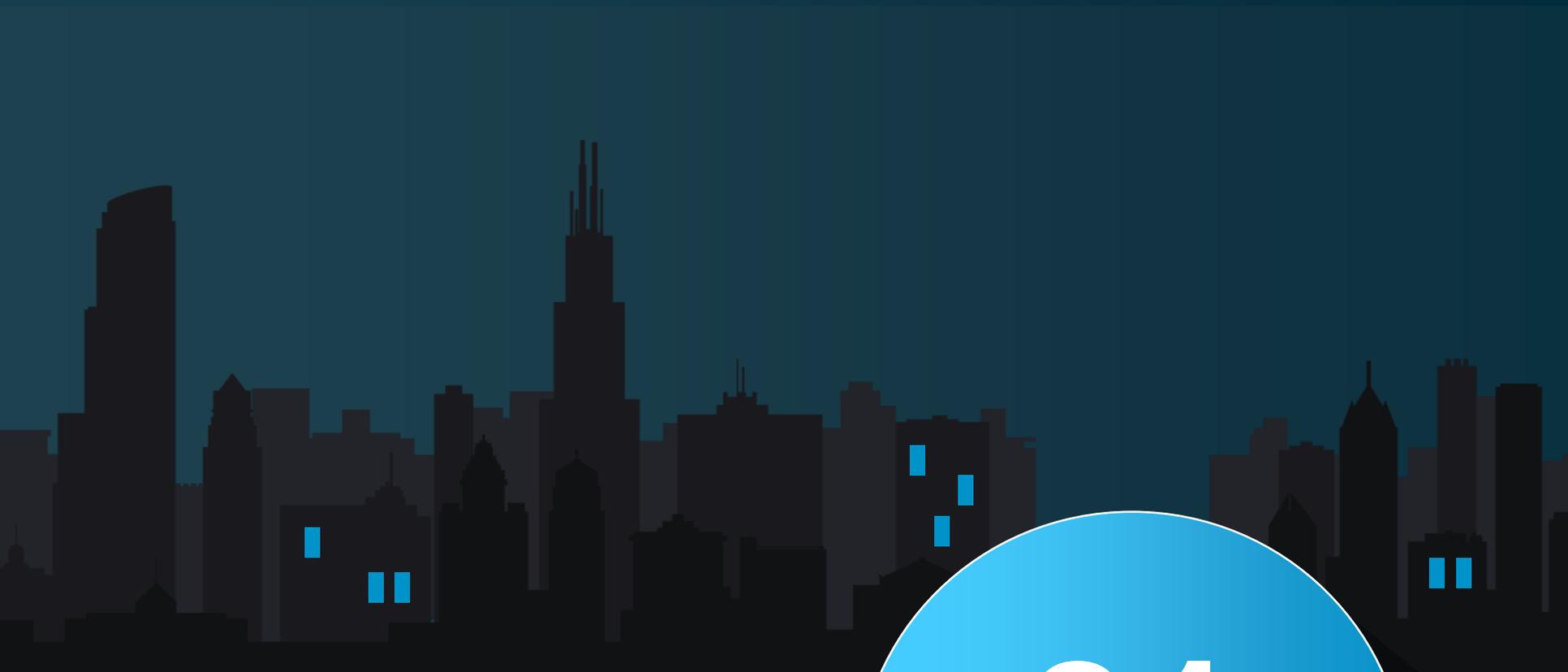
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01

**Findings and
Recommendations**

Findings and Actions

FINDING 1

Program participation improved tenant and property board perceptions of property managers.

ACTION 1

Augment outreach materials using verbatim property manager testimony demonstrating the value of the program's free, cost and energy saving energy efficiency upgrades. This can improve the likelihood of building boards and tenants getting onboard.

FINDING 2

Property managers that gave lower satisfaction marks to the energy saving benefits of the program were not necessarily dissatisfied with the energy savings, they simply had difficulty quantifying and understanding the energy saving benefits of the program.

ACTION 2a

Ask Franklin staff to highlight energy bill savings in the assessment to make property managers more aware of the potential dollar savings commonly associated with each measure they are eligible for according to their assessments.

ACTION 2b

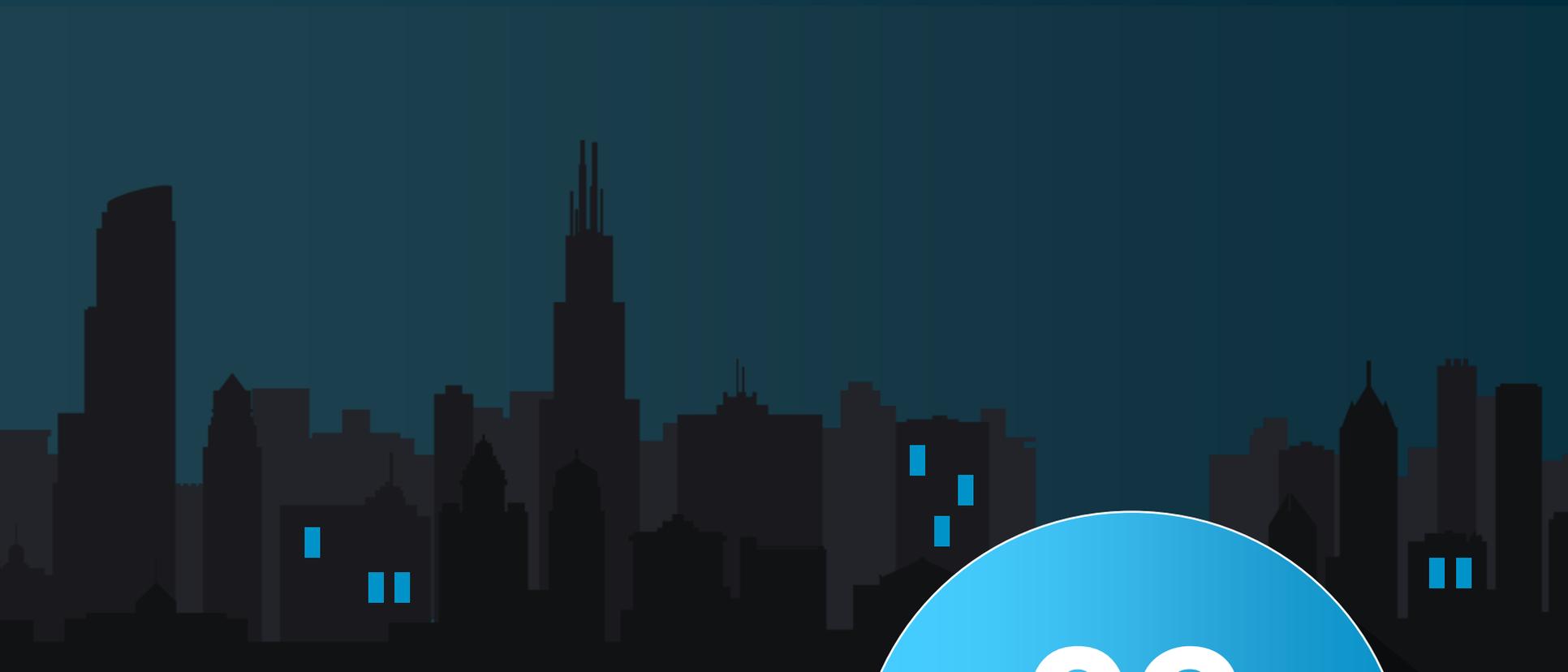
Show real bill savings from customers that participate in the program as part of the assessment.

FINDING 3

While satisfaction with the products installed through the program is high with an average mark of 9.1, three or 5% of property managers mentioned the program could be improved by being more customizable, including measures more specific to rehabilitating the building for increased comfort, such as window improvements and sealing air gaps.

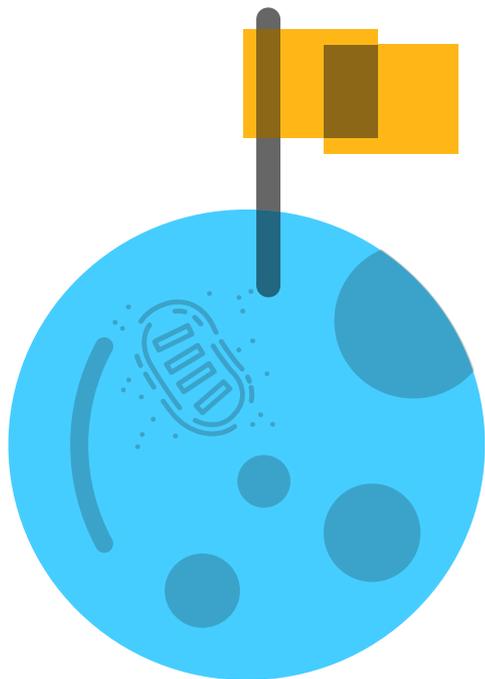
ACTION 3

Consider additional thermal comfort measures such as window and air sealing measures for inclusion in the program.



02
**Program
Details**

What are the program goals?



The Peoples Gas (PGL) and North Shore Gas (NSG) Multi-Family (MF) Program is designed to provide a “one-stop-shop” to owners and managers of market-rate multi-family properties to achieve comprehensive improvements in energy efficiency.

The primary objective of this program is to secure energy savings through direct installation of low-cost efficiency measures at eligible multi-family residences, and achieve comprehensive savings for the building common areas and central systems. The delivery approach consists of the following paths:

(1) The Energy Assessment “Jumpstart” and Direct Installation (DI) Path

of the program provides free energy efficiency products in residential dwelling units and common areas. The energy assessment identifies additional comprehensive efficiency upgrades that allow participants to implement deeper retrofit measures through other delivery paths.

Specific measures include:

- Faucet aerators
- Showerheads
- Pipe insulation
- Programmable thermostats

(2) The 3 Rebate Paths* of this program offer prescriptive and custom rebates to multi-family property decision-makers to implement energy saving measures.

Specific measures include:

- High efficiency boilers
- Steam pipe averaging controls
- Pipe insulation
- Steam traps

These are offered through

- **Prescriptive Rebates**
- **Custom Rebates**
- **Partner Trade Ally (PTA) installations**

The partner trade allies receive additional incentives for installing energy-efficient products.

How is the program implemented?

The program serves multi-family* building owners and managers seeking to generate electricity and natural gas savings throughout the property.

The program implementer, Franklin Energy Services (Franklin), is responsible for targeted outreach to property management companies, building owners, associations, and tenants. Franklin staff also conduct the energy assessments and majority of direct installations.

The program also offers direct installations of lighting retrofits and gas measures, such as pipe wrap, in common and exterior areas, by experienced trade allies.

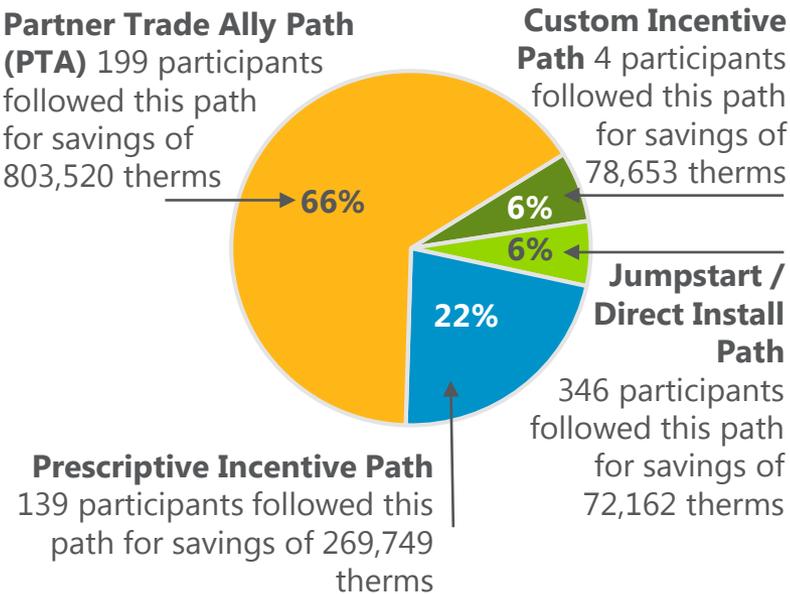
Utility**	Customers	
ComEd Only	180	
Nicor Gas Only	29	
Peoples Gas or North Shore Gas Only	273	
ComEd and Nicor Gas	145	
ComEd and Peoples Gas or North Shore Gas	451	
ComEd and Nicor Gas and Peoples Gas or North Shore Gas	14	
Total	1,092	
Utility** (Total)	Customers	%
ComEd	790	72%
Nicor Gas	188	17%
Peoples Gas or North Shore Gas	738	68%

* 3+ units for ComEd and Peoples Gas/North Shore Gas, 5+ units for ComEd and Nicor Gas.

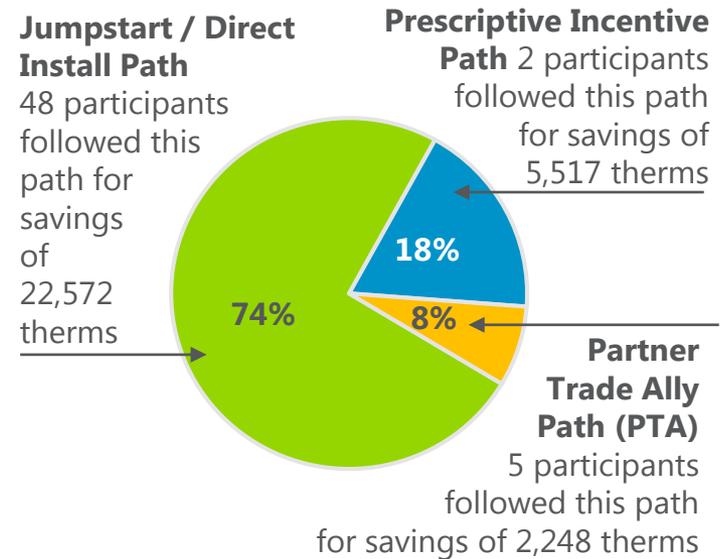
** Program eligibility and available measures differ by gas and electric utility territory and the number of residential units in a participating building. Recognizing these overlaps provides a foundation for understanding the distribution of gas versus electric measures and the proportion of participants eligible for both gas and electric measures.

What were the overall verified net savings?

Peoples Gas achieved a total of 1.22 million therms of net verified savings from 688 participants in the partner trade ally, prescriptive, custom, and jumpstart paths. This represents **39%** of PGLs residential portfolio verified net savings.



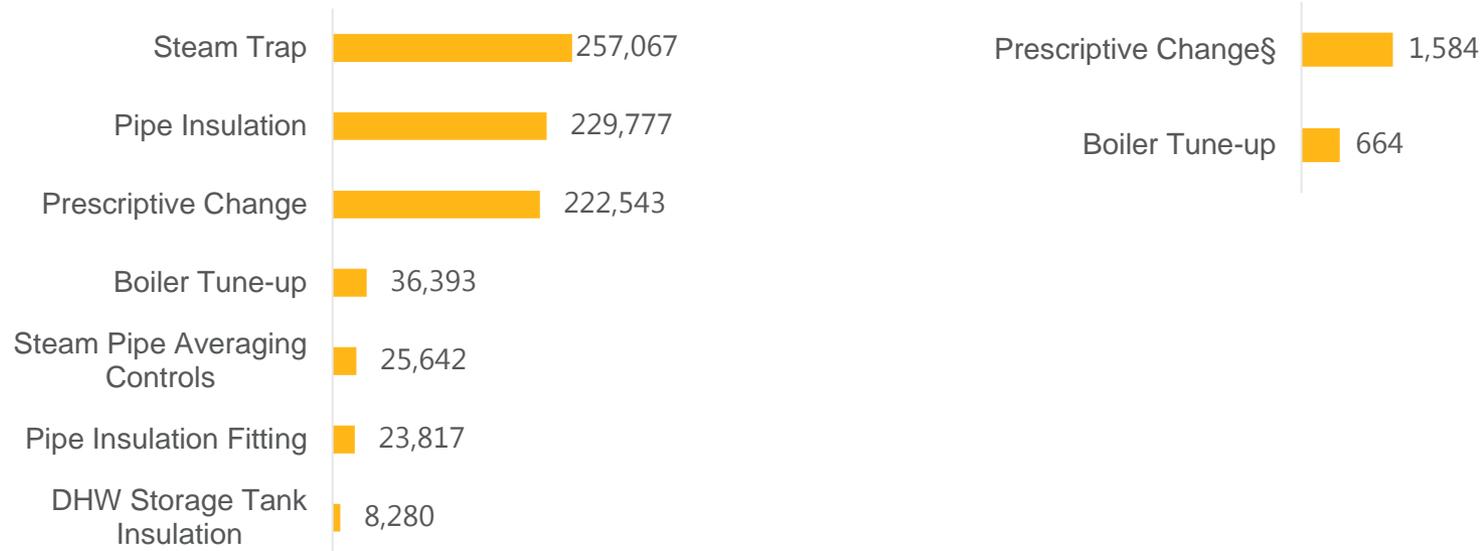
North Shore Gas achieved a total of 30,337 therms of savings from 55 participants in the jumpstart, prescriptive, and partner trade ally paths. This represents **3%** of NSGs residential portfolio verified net savings.



What is the **partner trade ally (PTA)** measure distribution?

The steam trap, pipe insulation, and prescriptive change* measures result in 87% of savings for the **Peoples Gas** PTA path.

Prescriptive Change measure accounts for 70% of the PTA path savings for **North Shore Gas**.

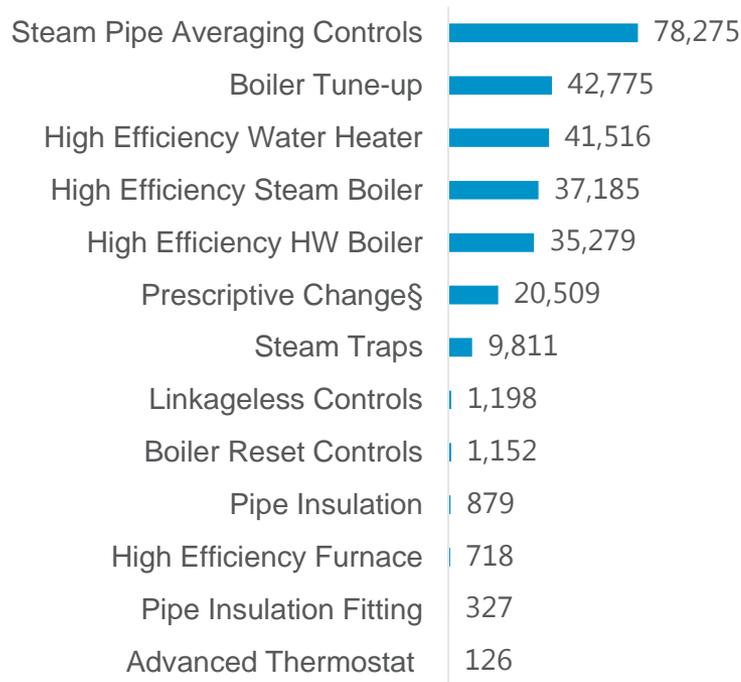


Source: Navigant 2018 Impact Evaluation Report

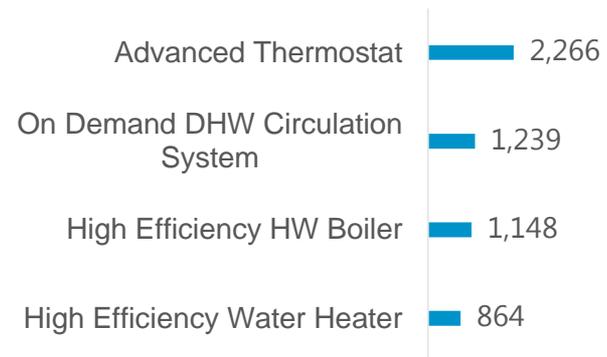
* § Projects characterized as "Prescriptive Change" are those that the implementer describes as having the ex ante savings capped at 20 percent of the customer annual gas usage, based on site considerations. These often involve steam traps and pipe insulation.

What is the **prescriptive path** measure distribution?

Steam pipe averaging controls, boiler tune-up, high efficiency water heater, high efficiency steam boiler, and high efficiency HW boiler resulted in 87% of savings for the **Peoples Gas** prescriptive path.

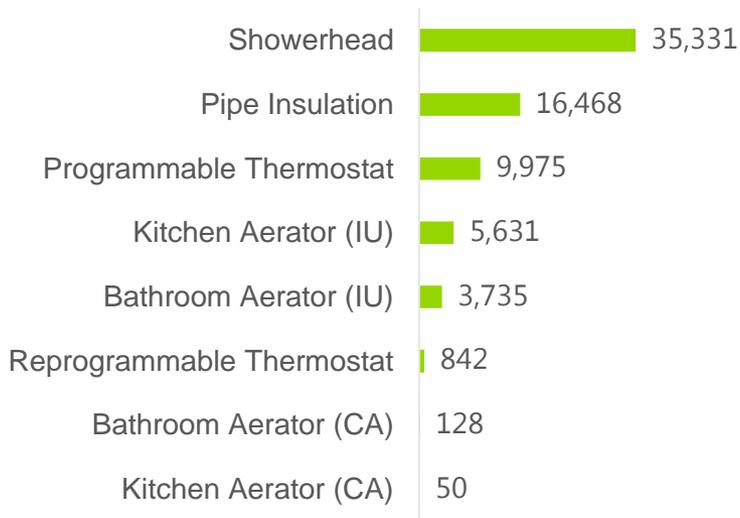


Advanced thermostats, on demand DHW circulation systems, and high efficiency HW boiler resulted 84% of savings for the **North Shore Gas** prescriptive path.

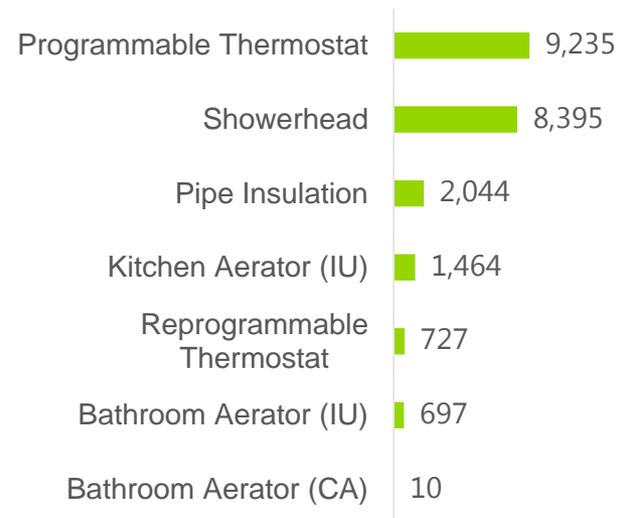


What is the **direct install** measure distribution?

In unit showerheads, in unit programmable thermostats, and hot water pipe insulation resulted in 84% of savings for the **Peoples Gas** direct install path.



In unit programmable thermostats and in unit showerheads resulted in 77% of savings for the **North Shore Gas** direct install path.



*IU signifies In unit

**CA signifies Common Area

Source: Navigant 2018 Impact Evaluation Report

Evaluation Questions

While the primary purpose of the participant surveys is to gather net-to-gross information, the evaluation team identified the following additional evaluation questions as part of its collaborative evaluation planning process with ComEd and Peoples Gas (PGL) / North Shore Gas (NSG):



What are building owners' and building managers' perspectives and overall satisfaction with the program?



What are the non-energy impacts resulting from participation?



What are the opportunities for continuous improvement?

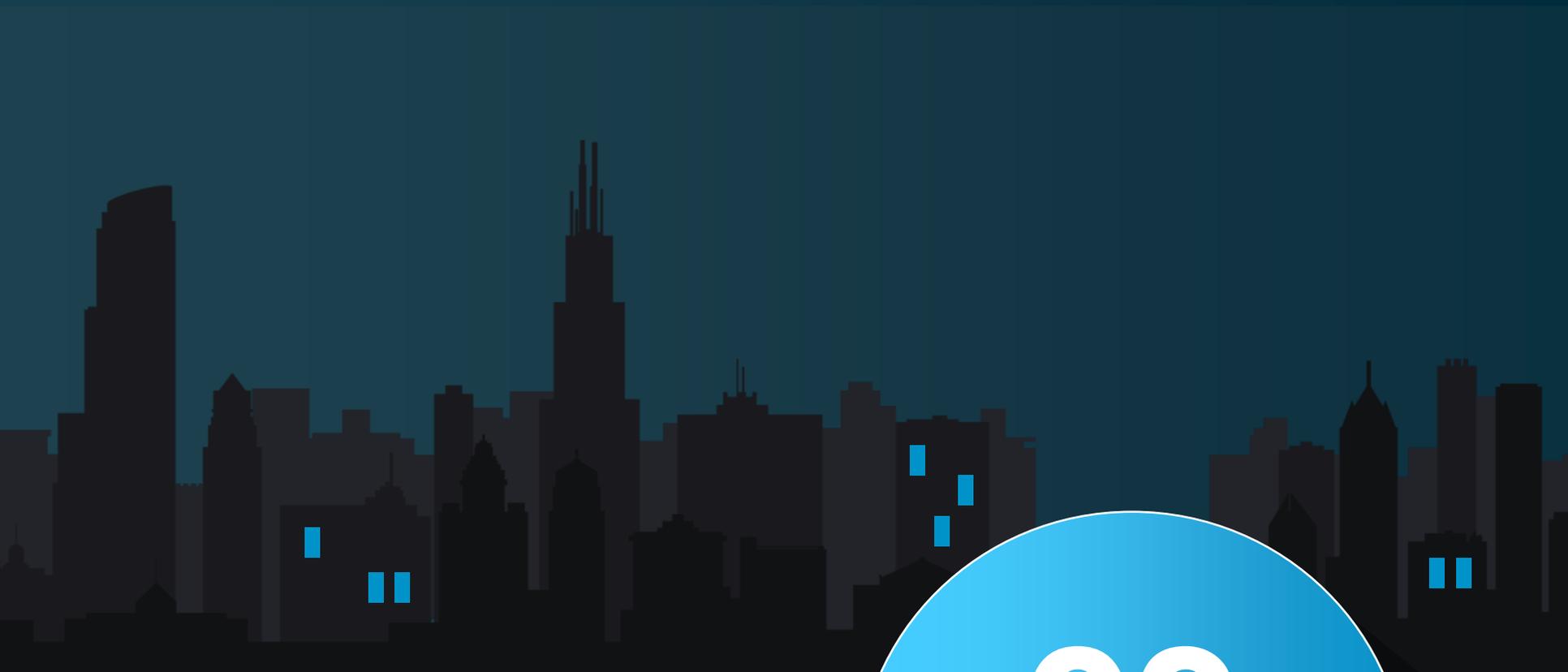
FREE RIDERSHIP SURVEY

SPILLOVER SURVEY

	FREE RIDERSHIP SURVEY	SPILLOVER SURVEY
Administration	Administered by Blackstone Group on behalf of Navigant through telephone surveys delivered to property managers and/or building owners. The population included 688 PGL and 55 NSG participating buildings.	
Participants	The team contacted customers who participated in the program between January 2018 and December 2018**	The team contacted customers who participated in the program between April 2017 and December 2017**
Fielding	Survey fielded between March 1, 2019 and April 26, 2019.	
Sample	The free ridership research sample had 669 participants, targeting 414 measure-level completes, yielding 350 measure-level completes across both gas and electric measures.	The spillover research sample consisted of 1,609 participants, targeting 68 program-level completes and yielding 65 completes.
Focus	The free ridership survey targeted CY2018 program participants and focused on free ridership and satisfaction.	The spillover survey was administered to PY6 program participants and focused on spillover and satisfaction.
Completes	26 PGL and 15 NSG property managers responded to the free ridership survey (n=41), and 30 PGL and 8 NSG property managers responded to the SO survey (n=38), for an 11% combined response rate which represents 19% of program savings.	

* The free ridership survey targeted CY2018 program participants and focused on free ridership and satisfaction while the spillover survey was administered to GPY6/EPY9 program participants and focused on spillover & satisfaction.

** Survey samples were extracted from different program years to allow time for spillover to occur, to question free ridership closer to the time of decision making, and to avoid overlap and survey fatigue.

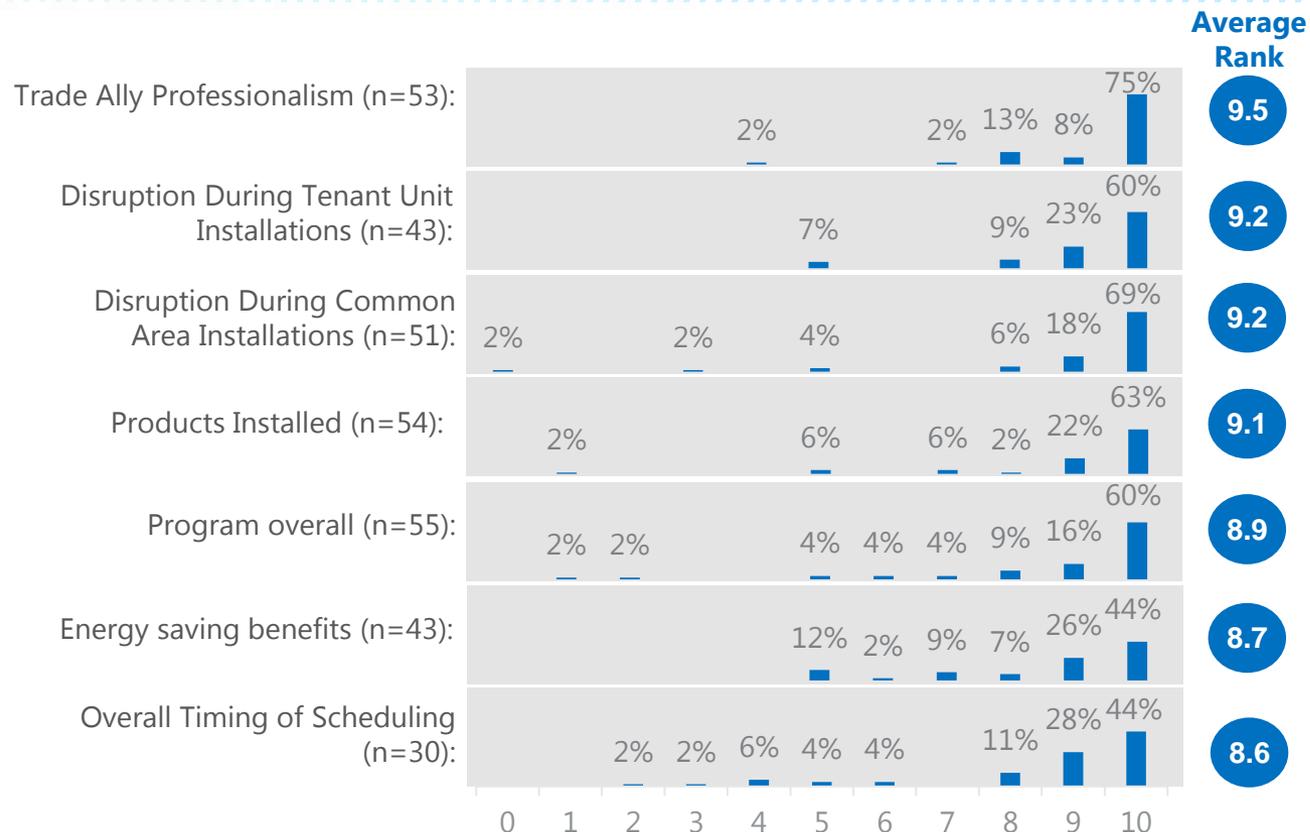
A dark silhouette of a city skyline with various skyscrapers and buildings. Some windows are highlighted in a light blue color. The background is a dark teal gradient.

03

**Participant
Survey Results**

Property Manager Satisfaction

Property manager satisfaction with the program is high, with all categories averaging above an 8.6 on a 10 point scale.



Positive Comments

Participation is Quick and Minimally Disruptive (29 / 52%)

"The work was done above average. They were in and out quickly, and cleaned when they finished."

Improved Temperature Reliability and Comfort (15/27%)

"Tenants were happy all winter. The heat in the building has better balance and is more consistent."

Constructive Comments

Application or Rebate Issues (4 / 7%)

"The application runs 16-20 pages, not all of which I had to fill out. I'm good at those kinds of things, many people are not."

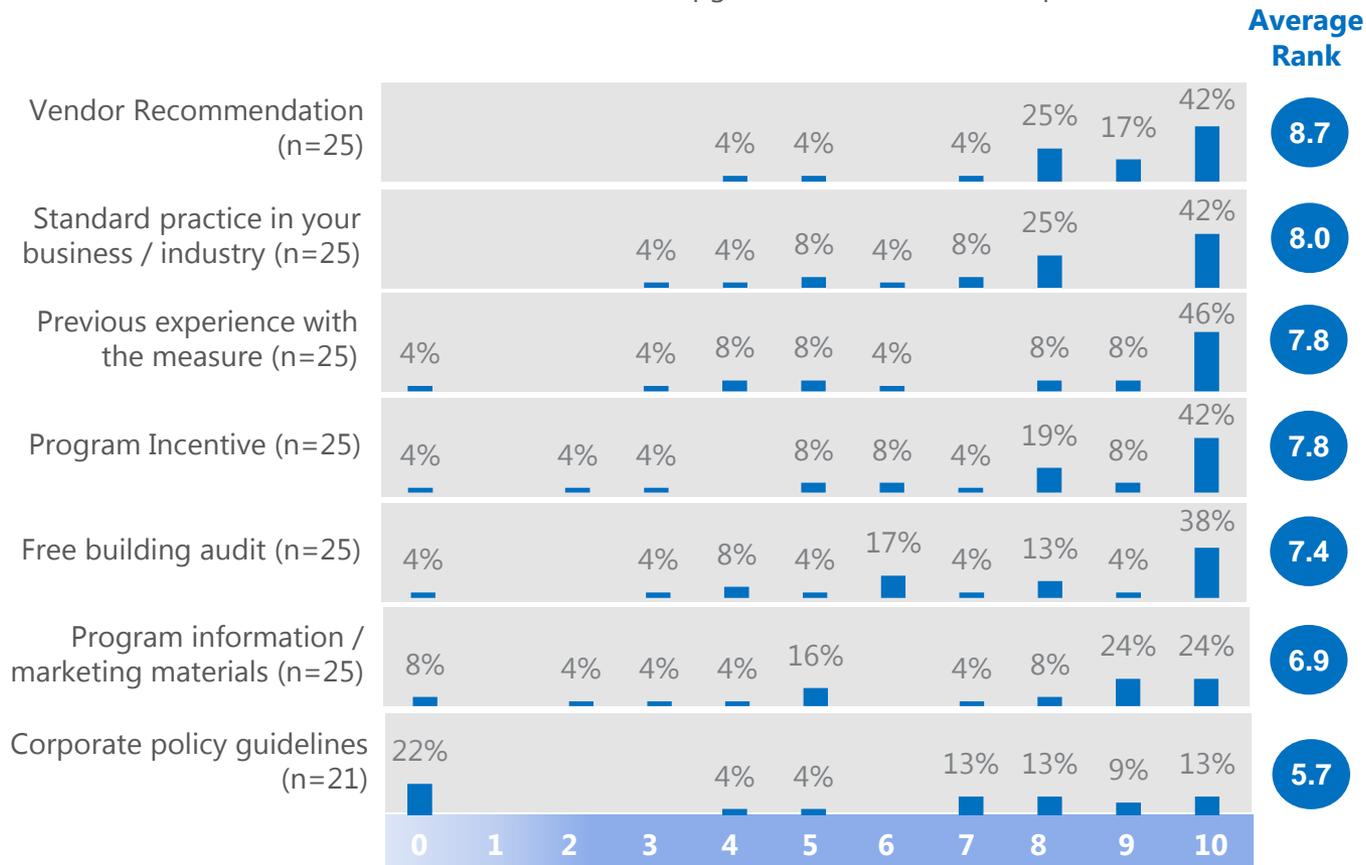
Request for service / measure expansion (3 / 5%)

"Gear it a little more toward comfort related items such as windows and sealing air gaps."

What were the key drivers in participants' decision making process?

Property managers rated the following factors as important in their decision to participate in the program: recommendation from an equipment contractor or vendor, standard practice in the industry, previous experience with the measure, the program incentive, and the free building audit.

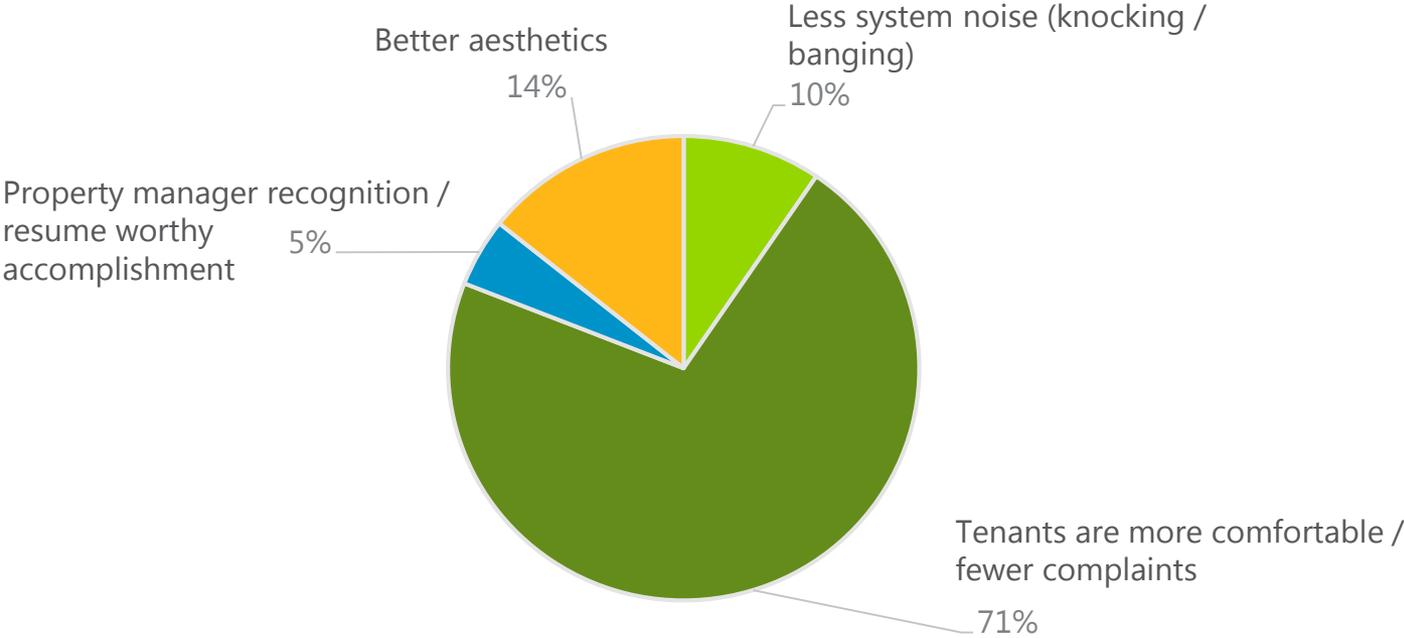
The survey asked program managers how they would rate the importance of the following factors on their decision to participate in the program and upgrades. The results are depicted below.

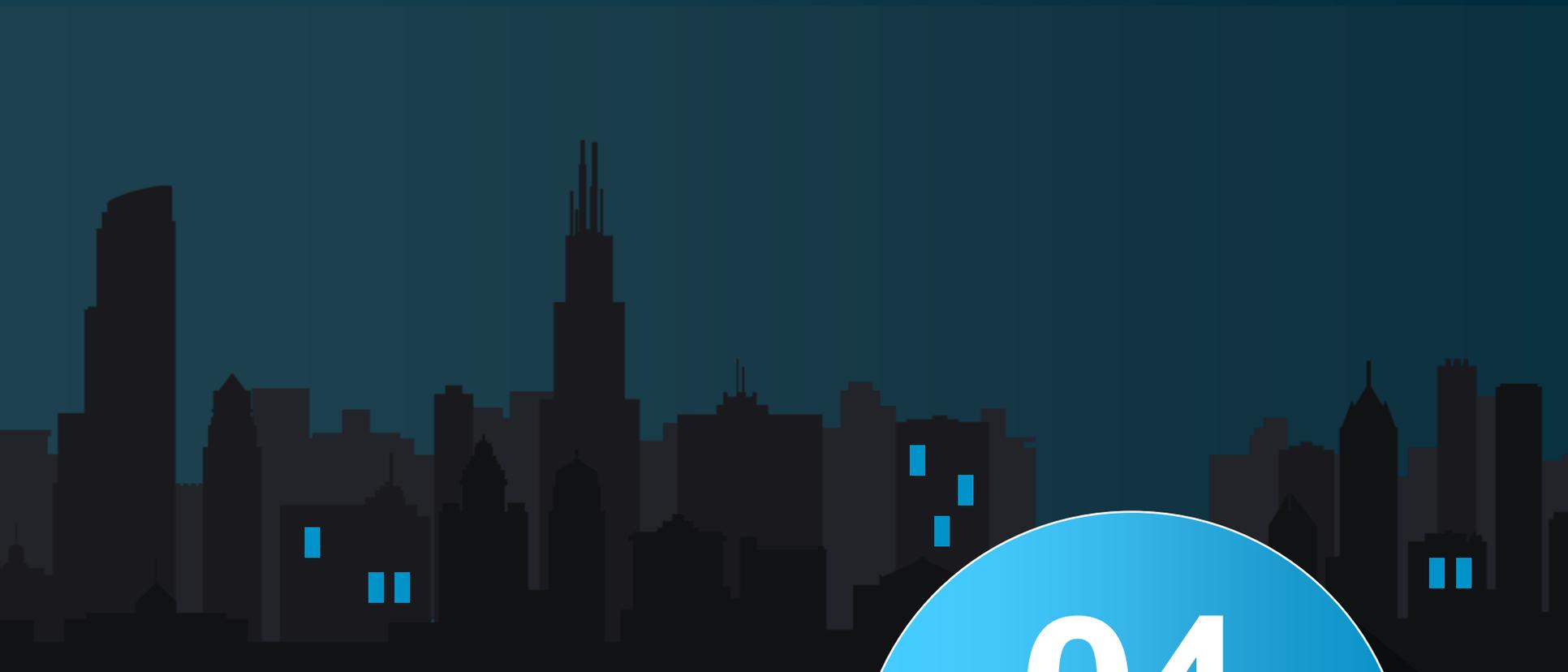


What non-energy impacts did participants see?

Free-ridership survey participants were asked about non-energy benefits. 20 of 26 or 77% of respondents mentioned program impacts related to non-energy benefits.

Tenant comfort and satisfaction is the most frequently mentioned non-energy benefit, followed by better aesthetics, less system noise, and the fact that participating in these upgrades makes the property manager look good.



A dark silhouette of a city skyline with various skyscrapers and buildings. Some windows are highlighted in a light blue color. The background is a dark teal gradient.

04

**Future
Evaluation
Questions**

Future Evaluation Questions

OVERVIEW

Navigant would like to acknowledge future evaluation questions posed during the IL TRM advisory group meetings.

QUESTION 1

How often are property managers involved in in-unit decisions versus common area decisions?

- Have property managers replaced in-unit energy consuming items in the past?
- Did they do this without incentives?
- If so, how often does this occur and for what items?

QUESTION 2

How often do tenants make in-unit decisions such as replacing thermostats or LEDs without the influence of a program or the property manager?

Navigant also acknowledges the following ComEd Multi-Family Market Rate program future evaluation questions that may be applicable to Peoples Gas and North Shore Gas.

QUESTION 3

Can the program improve the educational component of the assessment to ensure that participants fully understand the suite of measures available through the program in comparison to the measures indicated for installation through their building specific or unit specific assessment?