

# Multifamily Affordable Solar Housing Program Overview

Southern California Edison Workshop

October 6, 2009

# Program Overview

- Multifamily Affordable Solar Housing (MASH) is part of the California Solar Initiative; it offers solar incentives to qualifying affordable housing developments
- \$108.34M of statewide funding is allocated to the program
- It is managed by SCE, PG&E for their service territories and CCSE for SDG&E territory
- Eligible system size cap is 1 MW, minimum system size is 1 kW
  - Electrical load restricted to 12 month utilization for common area and tenant units will be aggregated for sizing limits
- Two incentive tracks are offered – Track 1 A/B and Track 2

# California Public Utilities Commission (CPUC) Program Goals

- Stimulate adoption of solar power in the affordable housing sector
- Improve energy utilization and overall quality of affordable housing through application of solar and energy efficiency technologies
- Decrease electricity use and costs without increasing monthly household expenses for affordable housing building occupants
- Increase awareness and appreciation of the benefits of solar among affordable housing occupants and developers

# Which buildings qualify for MASH rebates?

- Existing multifamily affordable housing must meet the definition of low-income residential housing established in Pub. Util. Code 2852.a.2
  - a) Multifamily housing financed with low-income housing tax credits, tax exempt mortgage revenue bonds, general obligation bonds, or local, state, or federal loans and grants and meets definition of Health and Safety Code Section 50079.5
  - or
  - b) A residential complex in which at least 20% of total units are sold or rented to lower income households as defined in Health and Safety Code Section 50079.5 and housing units targeted for lower income households are subject to deed restriction or affordability covenant...for at least 30 years
- Must have an occupancy permit for at least **two** years prior to applying for MASH incentives (no new construction)
- Eligible electric customer of SCE, PG&E, or SDG&E

# Program Budget

Program Admin	SCE
Track 1 A/B	\$34,656,032
Track 2*	\$9,200,000
M&O / Admin / M&V	\$5,980,368
<b>Total</b>	<b>\$49,836,400</b>

\*No more than 20% of the Track 2 budget can be awarded in one review cycle.

# Incentive Structure – Track 1

<u>Track 1A</u> Common Area Load	<u>Track 1B</u> Tenant Load
\$3.30/watt	\$4.00/watt

- Fixed incentive dollars per watt for Track 1; Not subject to megawatt triggers
- Can apply for both Track 1A and 1B
- Incentives are paid in one time lump sum payment
- May be eligible for 30% Federal Investment Tax Credit; Consult with the IRS or your tax consultant for more details
- Renewal Energy Credits belong to the System Owner

# Incentive Structure – Track 2

- Track 2 competitive grant style process now available (July 1 – Sept. 30)
- Opportunity to request for incentives above Track 1 amounts
- Must demonstrate direct tenant benefit e.g. reduction in monthly tenant expenses through appliance upgrades, weatherization measures, education and outreach, etc.
  - SCE's budget is \$1.84M for the current cycle (20% of \$9.2M)
  - Grant package = Completed MASH Track 1 Reservation Request documents + grant proposal + signed grant proposal form
  - Must be received by Sept. 30 not postmarked (no hand deliveries, emails, faxes)

# Track 1 and Track 2 Comparison

Feature	Track1	Track 2
Application Process	First come, first-served	Competitive grant-style
Application Cycle	Open application process	First and Third Quarter only
Incentive Rate	Fixed - \$3.30 common and \$4.00 tenant	Varies
Demonstrate Direct Tenant Benefit	Not required	Required
Incentive Award Limitation	No more than 80% of Track 1 budget can be allocated to either 1A or 1B	Only 20% of Track 2 budget can be awarded at any given application cycle

# Virtual Net Metering (VNM)

- Electric tariff that allows application of credits from a single solar generating system to multiple electric service accounts
- Building owner designates percentage of credits allocated to common and tenant accounts
- SCE's MASH VNM tariff approved – effective as of June 8, 2009
- Requires a net generator output meter capable of recording generator output in fifteen minute intervals at property owner's cost

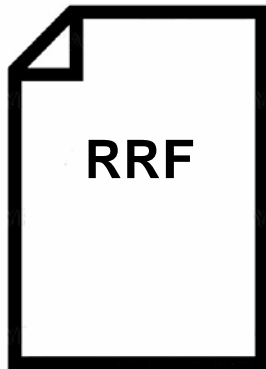
# Getting Started

# General Steps

1. Complete a free energy efficiency audit
2. Contact qualified solar contractors with active and current A, B, C-10 or C-45 license
  - Have twelve month usage history available (if possible)
3. Choose solar contractor
4. MASH application process begins

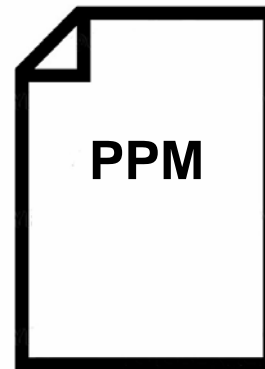
# 3 - Step Application Process

**Step 1. Reserve Funding**



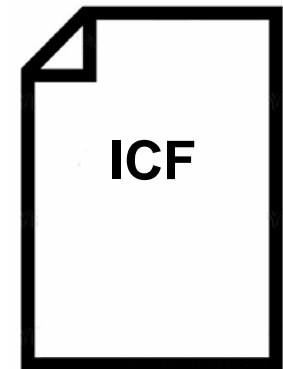
**Submit**  
**Reservation Request**  
**Form**

**Step 2. Show Progress**



**Submit**  
**Proof of Project**  
**Milestone**

**Step 3. Claim Incentive**



**Submit**  
**Incentive Claim**  
**Form**

# Step 1 of 3: Reservation Request Required Documents

## 1. Completed Reservation Request Form and Program Contract

- Application listing the customer, installer, project site, requested incentive amount, etc.

## 2. Documentation of an Energy Efficiency Audit (or Title 24 documentation or other exemptions)

- Can be done on SCE's website, onsite or mail

## 3. Copy of Signed Energy Efficiency Disclosure Form

## 4. Printout of EPBB Tool Calculation ([www.csi-epbb.com](http://www.csi-epbb.com))

- Each array requires a separate printout to determine correct incentive

## 5. Documentation of Low Income Status

- Any documentation to demonstrate that the building meets the definition of low income per CPUC Code 2852 e.g. Regulatory Agreement

## 6. Proof of occupancy greater than 2 years

- May be demonstrated in the form of 2 years of utility bills

If annual kWh on EPBB Calculator > previous 12 month usage history (if applicable)

## 7. Electrical System Sizing Documentation

- Square footage, list of new equipment/appliances with the wattage and expected use, or engineer calculations



# MASH Reservation Request Form



## Multifamily Affordable Solar Housing Program Reservation Request Form and Program Contract

**Return Reservation Request Form to:**  
Southern California Edison  
California Solar Initiative - MASH  
6042A Irwindale Ave  
Irwindale, CA 91702

Reservation Number: \_\_\_\_\_

(Administrator Use Only)

**Instructions:** Please confirm you are using the current Reservation Request Form by going to your Program Administrator's website. Please refer to your CSI Program Handbook for instructions, and please include all required attachments with your submittal. Incomplete Reservation Requests will be returned to the sender.

1. Host Customer		2. Applicant (if not Host Customer)	
Customer/Company Name <small>(Be listed on electric bill)</small>		Company Name	
Contact Name		Contact Name	
Mailing Address <small>(Suite/Apt, Street)</small>		Mailing Address <small>(Suite/Apt, Street)</small>	
<small>(City, State, Zip)</small>		<small>(City, State, Zip)</small>	
Email		Email	
Phone		Phone	
Fax		Fax	
3. System Owner (if not Host Customer)		4. Installer	
Company Name		Company Name	
Contact Name		License Number	
Mailing Address <small>(Suite/Apt, Street)</small>			
<small>(City, State, Zip)</small>			
Email		5. Seller	
Phone		Company Name	
Fax		License Number	
6. Project Site Information			
Site Address <small>(Suite/Apt, Street)</small>			
<small>(City, State, Zip)</small>			
County	Est. Building Sq. Ft.	Number of Tenant Units	
Common Area Load Electric Account(s)	Common Area Load Meter Number(s)		
Tenant Electric Account (for separately sized systems)	Tenant Meter (s)		

# Step **2** of 3: Proof of Project Milestone Required Documents

## 1. Completed Proof of Project Milestone Checklist

- The purpose of this checklist is to assist in the completion of information materials required for review of Proof of Project Advancement

## 2. Copy of Executed Agreement of Solar System Purchase and Installation

- Purchase/installation contract between involved parties

## 3. Copy of Request For Proposal (RFP) of Solicitation

- Notice to Invite Bids, of similar solicitation issued for the installation, lease, and/or purchase of the system proposed for the project

### If System Owner is different than Host Customer:

## 4. Copy of executed alternative System Ownership agreement

- Listing involved parties, terms, length of time, signatures, etc.

### If applicable:

## 5. Revised EPBB Calculation Printout(s)

- If the proposed system has changed at all please submit a new EPBB calculation printout

# Step 3 of 3: Incentive Claim Required Documents

## 1. Complete Incentive Claim Form

- Application indicating installed equipment and final incentive amount
- Final project cost breakdown is now part of ICF form

## 2. Indicate PMRS provider on Incentive Claim Form

Or If Exempt:

## 3. Copy of Performance Monitoring & Reporting Service (PMRS) Cost Cap Exemption Documentation (if applicable)

- copy of quote from eligible PMRS provider showing cost

If applicable:

## 4. Revised EPBB Calculation Printout(s)

- Required if installed equipment is different than proposed equipment in Reservation (Step 1)

## 5. Field Verification Certification Form

## 6. Documentation of Common/Tenant Load Allocation



# MASH Incentive Claim Form



## Multifamily Affordable Solar Housing Program

### Incentive Claim Form

*(Administrator Use Only)*

**Return Incentive Claim Form to:**

Southern California Edison  
California Solar Initiative - MASH  
6042A Irwindale Ave  
Irwindale, CA 91702

1. Host Customer		2. System Owner (if not Host Customer)	
Customer/Company Name <small>(As listed on electric bill)</small>		Company Name	
Contact Name		Contact Name	
Tax Payer ID <small>(if Payee except Res Cust)</small>		Tax Payer ID <small>(if Payee)</small>	
Mailing Address <small>(Suite/Apt. Street)</small>		Mailing Address <small>(Suite/Apt. Street)</small>	
	<small>(City, State, Zip)</small>		<small>(City, State, Zip)</small>
Email		Email	
Phone		Phone	
Fax		Fax	
3. Payee Information			
<input type="checkbox"/> Host <input type="checkbox"/> System Owner <input type="checkbox"/> Third Party:		Company Name	
		Contact Name	
		Tax Payer ID	
Tax Status for Payee of Incentive (check one):		Mailing Address <small>(Suite/Apt. Street)</small>	
<input type="checkbox"/> Individual/Sole Proprietor	<input type="checkbox"/> L.L.C. (Corporation)		<small>(City, State, Zip)</small>
<input type="checkbox"/> Partnership	<input type="checkbox"/> L.L.C. (Non-Corporation)	Email	
<input type="checkbox"/> Corporation	<input type="checkbox"/> Exempt	Phone	
		Fax	

#### 4. Confirmation of Incentive Claim

The photovoltaic system must be placed in service and a copy of this Incentive Claim Form, including all appropriate documentation, must be returned to the Program Administrator. Mailed claim forms must be postmarked by, and will be accepted no later than, the Reservation Expiration Date. This reservation is nontransferable and the photovoltaic system must be installed on the Host Customer Site listed below and as submitted on the original Reservation Request Form. The information for this section is found on your Reservation Confirmation Letter.

# Helpful Links

- Go Solar California: <http://www.gosolarcalifornia.ca.gov/index.html>
- California Solar Initiative Handbook:  
<http://www.gosolarcalifornia.ca.gov/documents/>
- California State License Board: <http://www.cslb.ca.gov/>
- EPBB Calculator: <http://www.csi-epbb.com/>
- SCE's Solar Net Energy Metering Application:  
<http://www.sce.com/residential/rebates-savings/mash/NEM/NEMSolar.htm>



# Southern California Edison Contact

## **Multifamily Affordable Solar Housing (MASH):**

Aileen Lagbao, Program Manager

E-mail: [aileen.lagbao@sce.com](mailto:aileen.lagbao@sce.com)

Phone: 626-633-3317

Website: <http://www.sce.com/mash> (MASH forms are located on this website)

## **Multifamily Energy Efficiency Rebate Program:**

<http://www.sce.com/multifamily>

## **Low Income Energy Efficiency:**

<http://www.sce.com/residential/income-qualified>