

# Memo

**To:** Board of Directors

**From:** Erika Kociolek, Evaluation Sr. Project Manager  
Susan Jowaiszas, Marketing Lead – Energy Programs  
Alex Novie, Measure Development Manager

**Date:** June 25, 2020

**Re:** Staff Response to Property Manager Market Research

Energy Trust hired ILLUME Advising to perform market research on property managers of small and medium industrial, commercial, and multifamily buildings (less than 50,000 square feet). The research focused on how property managers approach operations and maintenance, property assessments, and capital investments, and sought to collect this information via a web survey.

Despite significant efforts to recruit property managers for this research, only a small fraction of the target number of surveys were completed. The responses may not be typical of property managers of small and medium buildings given two-thirds of the 14 respondents came from a list of Energy Trust participants, and four of the 14 respondents indicated they were also building owners. ILLUME Advising noted given the challenges they encountered attempting to reach property managers for this research, they anticipate this will be a difficult group for Energy Trust to engage directly, confirming an early hypothesis about property managers. However, based on the small number of completed surveys, ILLUME Advising found property managers are integral in the planning of building improvements, with almost all reporting that they check on their buildings regularly, 11 of 13 reviewing equipment conditions during these checks, and seven of 13 reviewing service contracts during these checks.

Given the importance of property managers in the planning of building improvements for businesses operating in leased spaces, Energy Trust must find ways to effectively work with property managers and engage them in programs. ILLUME Advising recommended conducting ride-alongs with a small number of property managers or vendors serving property managers. There are no immediate plans to pursue ride-alongs, but program staff is currently considering offerings geared at small and medium businesses, including property managers; there may be a need for research to support and inform future offer developments for this segment of property managers and business tenants. Insight from vendors and community partners that support smaller business may also help staff understand when and how to engage property managers (e.g., during leasing, tenant improvement plans and ongoing maintenance activities).

# MEMO

## SMALL AND MEDIUM COMMERCIAL, INDUSTRIAL, AND MULTIFAMILY PROPERTY MANAGER MARKET SURVEY FINDINGS

PREPARED FOR: Energy Trust of Oregon  
PREPARED BY: ILLUME  
DATE: May 6, 2020

### INTRODUCTION

Energy Trust of Oregon (Energy Trust) contracted with Illume Advising to conduct exploratory market research on property managers of small and medium buildings. To understand how property managers of small and medium industrial, commercial, or multi-family buildings approach operations and maintenance, property assessments, and capital investments, we surveyed 14 property managers that managed small or medium buildings. We also conducted a literature review<sup>1</sup> and two scoping interviews<sup>2</sup> prior to the survey to inform survey instrument questions, which can be found in Appendix A.

The specific group we sought to research, small and medium industrial, commercial, or multi-family property managers, is a challenging group to find and to research. We encountered many difficulties engaging property managers that managed at least one small or medium building (less than 50,000 square feet) to take the survey. As such, in this memo, we do not attempt to conduct any statistical analyses on the survey data. Also, while we provide some answers to the research questions this research set out to answer, we cannot fully answer them with the data at hand. However, given our experience attempting to interview and survey property managers who manage smaller buildings, we anticipate that this will be a tough population for Energy Trust to engage directly.

In this memo, we outline our challenges in contacting and surveying property managers of small and medium buildings and summarize high-level findings for Energy Trust to consider when engaging this population.

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<sup>1</sup> We reviewed about 20 documents that discussed property management, commercial buildings, or behavioral science to inform the survey guide.

<sup>2</sup> We conducted a thirty-minute interview with a property manager who manages buildings for the elderly and disabled and a twenty-minute interview with a building owner. We used these interviews to help craft the property manager survey instrument and flesh out the literature review findings.

## SURVEY FIELDING CHALLENGES

Working with Energy Trust, we used several outreach methods to field this web-only survey between May and July 2019. We first used an InfoUSA list of potential property managers with email addresses. This approach did not yield many respondents to our survey, only generating three responses from property managers of small or medium buildings (attaining a 1% response rate). We then asked the Building Owners and Managers Association of Oregon (BOMA) to send out an email invitation to their email listserv, which garnered two survey respondents. We could not calculate a response rate for this group because we did not have an estimate of the number of contacts on their listserv. Given the low number of completes to this point, five in total, we elected to use Energy Trust’s list of property managers who had participated in a program in prior years. We obtained the most responses from this group, nine, for a total of 14 survey respondents. Table 1 below shows data collection statistics for the two methods with known lists of contacts.

TABLE 1. SURVEY OUTREACH STATISTICS BY OUTREACH METHOD

LIST	EMAILS SENT	BOUNCED EMAILS	VALID COMPLETES	RESPONSE RATE
Info USA	463	65	3	1%
Energy Trust’s Participant List	127	10	9	8%
Total of known lists	590	75	12*	2%

\* This total excludes the two respondents from the BOMA outreach.

Almost two-thirds of respondents to the survey came from Energy Trust’s participant list. As a result, we believe that the survey results may not reflect typical property managers of small and medium buildings. This bias is compounded by the small number of completes we obtained, 14 out of a target of 68. Further, while we were targeting property managers for this survey, four of the 14 respondents indicated they were building owners in the survey. While these four owners may functionally serve as property managers for the properties they own, their responses may be qualitatively different from non-owner property managers since these owners also serve as the main decision-maker for capital improvements.

Given this bias, we recommend interpreting findings from this survey with caution. We constrain our reporting to the questions with clear patterns of responses.<sup>3</sup>

## HIGH-LEVEL FINDINGS

### NEEDS ASSESSMENTS AND CAPITAL IMPROVEMENT PLANNING

Property managers surveyed reported being closely engaged with their buildings, with most (9 of 14) respondents checking on their buildings weekly or monthly. Most (10 of 13) respondents conduct these checks in-house rather than contracting out to other companies. Almost all respondents (11 of 13) review equipment conditions during

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<sup>3</sup> In the survey, we asked respondents about the number and type of buildings they manage, the lease structures of the buildings, and how tenants pay for gas and electric service. Respondents provided a wide variety of responses to these questions, providing no clear patterns to report on. Given the small number of respondents to the survey, we do not report on these data in this memo but do provide frequencies to responses for all questions in a separate Excel file.

their checks, and about half (7 of 13) review service contracts. Over a third (5 of 13) interview service contractors and four of 13 spot test equipment during these checks as well.

When planning for renovations and upgrades, respondents reported relying upon three main sources of information: building walkthroughs (10 of 13), building problem reports (8 of 13), and tenant feedback (8 of 13). A subset (5 of 13) also indicated they use capital improvement plans.

About half of respondents (6 of 13) indicated they plan on making renovations annually (five mentions) or more often (one mention). Three respondents mentioned the timing depended on their “reserve studies”. Reserve studies are studies that assess the current funding reserves and the current needs of the properties, resulting in a document to help boards or owners financially prepare for repairs or replacement of critical building measures. This is notable as these three respondents provided this response as an “other” option that was not provided as a survey response option.

## **PROPERTY MANAGER’S ROLE IN IMPROVEMENTS**

When making plans for renovations, all but one respondent (12 of 13) noted they serve as the main coordinator/project manager when making improvement plans. Property managers largely coordinate with building owners (5 of 8 non-owner respondents) when planning renovations. Some respondents also mentioned coordinating with contractors, architects, maintenance staff, tenants, and boards of directors when planning renovations. Half (4 of 8) of respondents indicated they are trying to fix old or outdated systems when planning renovations, about a third (3 of 8) indicated they were trying to lower maintenance or operational costs, and a third (3 of 8) were trying to make energy efficient renovations.

Most (6 of 8) non-owner respondents noted bids as a component in their process to get the work approved by owners. Further, almost all (11 of 12) respondents noted that building problem reports helped make a case for building improvements. Two-thirds of respondents also cited equipment failures (8 of 12), and financial metrics (8 of 12) helped make a case for improvements, and over half (7 of 12) cited tenant complaints. Three quarters (9 of 12) of respondents used simple payback as a financial metric when planning improvements.

While many respondents noted they use tenant complaints to make a case for improvements, all but one respondent noted they tend not to involve tenants when making improvements to tenant spaces in the building. The one respondent who noted engaging tenants during the process was a building owner who asked for tenant input on potential improvements. For public spaces, two respondents indicated that open meetings or resident councils might be involved. Otherwise, most respondents (8 of 11) indicated they did not involve tenants other than providing notification of an upcoming improvement.

## **TIMING OF IMPROVEMENTS**

We asked respondents where they fit along a continuum of providing reactive maintenance and providing preventative maintenance. Almost all (10 of 11) noted they fall either at the half-way point between reactive and preventative maintenance or closer to the preventative maintenance end of the spectrum. And four of those ten indicated they fall closer to providing more preventative maintenance than reactive maintenance. However, this varies by improvement type, with almost three quarters (8 of 11) of respondents noting they typically upgrade HVAC and water heating measures upon failure. In contrast, respondents are likely to upgrade landscaping (8 of 11), interior décor (5 of 11), and common area lighting (5 of 11) when they are indicated in their improvement plans rather than waiting until they fail, as indicated by the following quote: *“I try to plan in advance, but often system failures force me to head in another direction.” – Survey Respondent*

## **PARTICIPATION IN ENERGY EFFICIENCY PROGRAMS AND INFORMATIONAL NEEDS**

All but one (10 of 11) respondent was aware of Energy Trust of Oregon, and almost three-quarters (8 of 11) of respondents said they had participated in an energy efficiency program. These are high levels of awareness and participation and is likely due to the composition of respondents in the survey - with eight of the 11 respondents coming from the Energy Trust program participation list.

All respondents (11 of 11) indicated they would find rebate information helpful when making energy-related upgrade decisions. Most respondents (9 of 11) thought an energy audit would be helpful, and almost three-quarters (8 of 11) indicated information on efficient options for specific equipment would be helpful.

## **CONCLUSIONS**

Our research, particularly the efforts we took to engage property managers for this survey, suggests that property managers of small and medium buildings are likely a hard population to engage with directly in a program. However, given how integral property managers are in the planning of building improvements, and their potential influence with building owners, they are likely a worthwhile population for Energy Trust to engage. And once engaged, as responses of this survey suggest, property managers want information on energy efficient rebate options.

Energy Trust will likely need to find ways to provide this information to property managers such that property managers have it readily available when they must make quick repairs. This is particularly true for HVAC and water heating upgrades, as most managers indicated they replace those units upon failure rather than as part of an improvement plan.

We suggest Energy Trust conduct “day in the life” ride-along research with property managers themselves, or with vendors serving property managers, to identify where and how Energy Trust can engage with property managers.

# APPENDIX A. SURVEY INSTRUMENT

## SURVEY SCOPE

We will conduct a web survey of Oregon property managers. This survey is designed to be 15 minutes long and will cover the objectives shown in Table 1. We will describe our sampling approach in a separate document.

TABLE 2. RESEARCH OBJECTIVES, AND RESEARCH QUESTIONS

OBJECTIVE	RESEARCH QUESTION
<i>Overview of Buildings and Business</i>	What's the relationship between property managers, facility engineers and building occupants?
	How are property managers conducting property assessments, capital improvement planning, and operations and maintenance (O&M) planning?
	Who is typically involved in property assessments, capital planning, and O&M planning?
	What's the typical timeline, and how often are plans updated/revisited?
	What elements play into planning-related decisions and actions?
	What are the "triggers" for replacing systems and equipment, and how do these vary?
	What are the schedules for replacing systems and equipment, and how do these vary?
<i>Operations and Maintenance Assessment and Capital Improvement Plans</i>	How do they prioritize actions related to property assessments, capital planning, and O&M planning?
	What tools do they use (if any) to inform property needs assessments and capital planning?
	What is the typical lease structure? How might this vary by owner or tenant preferences?
	How (if at all) does the purchase or sale of a property play into planning-related decisions and actions?
	How (if at all) does lease structure play into planning-related decisions and actions?
<i>Lease Structure and Relationships with Tenants</i>	How (if at all) do requests from building occupants (tenants or owners) play into planning-related decisions and actions?
	Do energy ratings and benchmarking activities like LEED, and/or Energy Star inform planning-related decisions and actions?
	How does O&M and capital improvement planning relate to potential energy efficiency interventions or tools?
<i>Energy Efficiency and the Building</i>	

## EMAIL INVITATION

Subject: Give your feedback on the properties you manage

Dear [FIRST AND LAST NAME],

You have been selected to participate in a brief survey on behalf of a statewide research initiative to learn more about the needs of property managers. Your participation is very important and will help ensure that organizations

like Energy Trust of Oregon create energy-saving programs that help you. The survey should only take 15 minutes to complete.

Respondents who complete the survey by [DATE] will be entered into a drawing to win one of fifteen \$20 gift cards.

To begin this 15-minute survey, please follow the link below:

[LINK]

Your feedback will help improve our service to you and will be kept strictly confidential. Complete the survey and you will be entered to win one of fifteen \$20 gift cards.

If you have any questions about this study, please contact me at [alex@illumeadvising.com](mailto:alex@illumeadvising.com).

Thank you for sharing your thoughts and your time!

Sincerely,

Alex Dunn  
ILLUME Advising

## **INSTRUMENT**

### **INTRODUCTION**

Thank you for taking this survey to provide Energy Trust of Oregon with information about your role as a property manager! Your response to this survey will help Energy Trust of Oregon better address property manager needs in Oregon. The survey should take about 15 minutes to complete and your responses will be kept confidential.

You will be entered into a drawing to win one of fifteen \$20 gift cards once you complete the survey.

### **SCREENING**

- S1. What is your title? [OPEN END]
- S2. Do you manage commercial or multi-family properties?
1. Yes
  2. No [THANK AND TERMINATE]
  98. Don't know [THANK AND TERMINATE]

[ASK ALL]

- S3. Do you manage multifamily properties with 50 or more units?
1. Yes
  2. No
  98. Don't know

[If (S3 = 2 or 98) and (S4 = 2 or 98) [THANK AND TERMINATE]

[ASK IF S3 = 1]

S4. What types of buildings do you manage that are smaller than 50,000 square feet? Please select all that apply.

[MULTIPLE RESPONSE]

1. Residential single-family detached units
2. Small multifamily (2-9 units)
3. Medium-sized multifamily (10-49 units)
4. Small commercial (< 20,000 sq. ft. properties)
5. Medium commercial (20,000 to 50,000 sq. ft. properties)
6. Small industrial buildings (< 20,000 sq. ft. properties)
7. Medium industrial buildings (20,000 to 50,000 sq. ft. properties)
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know [IF (S4 = 2 or 98) THANK AND TERMINATE]

[ASK ALL]

S5. Do you manage commercial or industrial buildings that are larger than 50,000 square feet?

1. Yes
2. No
98. Don't know

[ASK IF S6 = 1]

S6. What types of buildings do you manage that are larger than 50,000 square feet? Please select all that apply.

[MULTIPLE RESPONSE]

1. Large commercial (> 50,000 sq. ft. properties)
2. Large industrial buildings (20,000 to 50,000 sq. ft. properties)
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[DISPLAY IF (S6 = 1) and (S3 = 1) *Respondents that manage both large buildings AND smaller buildings receive the following instructions*]

*We'd like to ask you a few questions about how you manage your buildings in Oregon that are less than 50,000 square feet. For the following questions, please think of your buildings in Oregon that are less than 50,000 square feet specifically.*

## OVERVIEW OF BUILDINGS AND FIRMOGRAPHICS

[ASK ALL]

Q1. How many buildings does your business manage in total in the state of Oregon? [NUMBER]



[ASK ALL]

Q2. How many buildings do you personally manage in the state of Oregon? [NUMBER]

[ASK ALL]

Q3. How many of the buildings you personally manage in the state of Oregon have the following?

[SINGLE RESPONSE, RANDOMIZE]

1. Facility manager [FORCE NUMERIC RESPONSE]
2. Building engineer [FORCE NUMERIC RESPONSE]
3. Maintenance staff [FORCE NUMERIC RESPONSE]
4. Building operator [FORCE NUMERIC RESPONSE]
5. Energy manager [FORCE NUMERIC RESPONSE]
6. Residential property manager [FORCE NUMERIC RESPONSE]
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q4. In how many of the buildings that you personally manage do you typically contract out the following activities?

[SINGLE RESPONSE, RANDOMIZE]

1. Energy management services [FORCE NUMERIC RESPONSE]
2. Building operations [FORCE NUMERIC RESPONSE]
3. Maintenance of building systems (HVAC, controls, etc.) [FORCE NUMERIC RESPONSE]
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

## OPERATIONS, MAINTENANCE ASSESSMENTS, AND CAPITAL IMPROVEMENTS

[ASK ALL]

Q5. How often, if at all, do you check the condition of your buildings?

[SINGLE RESPONSE]

1. Daily
2. Weekly
3. Monthly
4. Once every six months
5. Once a year
6. Never
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK IF Q5 = 1, 2, 3, 4 OR 5]

Q6. For these checks, how often, if at all, do you contract the work out?

[SINGLE RESPONSE]

1. Contract out all checks
2. Contract out more than 75% of checks, but do some checks in-house
3. Contract out 25% to 75% of checks
4. Contract out less than 25% of checks, but don't do all in-house
5. Do all checks in-house
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK IF Q5 = 1, 2, 3, 4, 5]

Q7. What activities do you typically conduct when you check the condition of your buildings? Choose all that apply.

[MULTIPLE RESPONSE, RANDOMIZE]

1. Interviews with management
2. Interviews with service contractors
3. Review of equipment conditions
4. Review of building documentation
5. Review of service contracts
6. Spot test of equipment
7. Spot test of controls
8. Analysis of critical data points (i.e. temperature, pressures, electrical, etc.)
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q8. Do you plan to renovate or upgrade any your buildings within the next two years?

[SINGLE RESPONSE]

1. Yes, all of them
2. Yes, some of them
3. No
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK IF Q8=1, 2]

Q9. How many of your buildings do you plan to renovate or upgrade within the next two years?

[NUMERIC OPEN END]

98. Don't know

[SHOW ALL]

*In the next set of questions, we want to learn about how you, and others you work with, develop plans for renovations and upgrades. When answering these questions, please think of a typical smaller building you manage.*

[ASK ALL]

Q10. Thinking about a typical smaller building that you manage, how often do you or others plan for renovations or upgrades?

1. Every quarter
2. Every six months
3. Annually
4. Every 2 years
5. Every 3 years
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q11. What is your role in the development of plans for renovations and upgrades?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q12. Who else is involved in planning for renovations and upgrades?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q13. Who generally leads the planning for renovations and upgrades? Please select one.

[SINGLE RESPONSE, RANDOMIZE]

1. Property manager
2. Facility manager
3. Building engineer
4. Maintenance staff
5. Building operator
6. Energy manager
7. Project manager associated with property management company
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q14. Who provides input about what goes into planning for renovations and upgrades? Please select all that apply.

[MULTIPLE RESPONSE, RANDOMIZE]

1. Property manager
2. Facility manager
3. Building engineer
4. Maintenance staff
5. Building operator
6. Energy manager

7. Tenants
8. Project manager associated with property management company
9. Property owner
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q15. What are the typical problems you are trying to solve when planning for renovations and upgrades?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q16. What resources do you use to inform your planning for renovations and upgrades?

[MULTIPLE RESPONSE, RANDOMIZE]

1. Prior capital improvement plans
2. Building documentation
3. Building problem reports
4. Equipment tests
5. Building walk through
6. Tenant feedback
7. Energy performance reports
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q17. What is the process you use to get renovations and upgrades approved by the owner?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q18. What tools or information help you make a case to owners for building improvements? Please select all that apply.

[MULTIPLE RESPONSE, RANDOMIZE]

1. Tenant complaints
2. Financial metrics (e.g., payback, IRR, MIRR, NPV)
3. Building problem reports
4. Equipment failures
5. Equipment tests
96. Other, please specify: [OPEN-ENDED RESPONSE]
97. Not applicable
98. Don't know

[ASK ALL]

Q19. What financial metrics do you look at when deciding what goes into plans for renovations or upgrades? Please select all that apply.

[MULTIPLE RESPONSE, RANDOMIZE]

1. Simple payback
2. Internal rate of return (IRR)
3. Modified internal rate of return (MIRR)
4. Net present value (NPV)
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q20. How, if at all, are tenants involved when you make changes to tenant spaces within your buildings?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q21. How, if at all, are tenants involved when you make changes to public spaces within your buildings?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q22. Do you have any tenants who make changes to any of the following major systems? Please select all that apply.

[MULTIPLE RESPONSE, RANDOMIZE 1 TO 5]

1. In-unit lighting
2. Common area lighting
3. HVAC
4. Domestic hot water
5. Kitchen equipment
6. None
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK IF Q22 = 1, 2, 3, 4, 5, OR 96]

Q23. Is this common?

[SINGLE RESPONSE]

1. Yes
2. No
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q24. When do you typically upgrade the following...? Please select all that apply.

[MATRIX QUESTION: MULTIPLE RESPONSE]

Item	Replace on failure	When we have money	When it is in the plan	When a tenant complains	When tenants change over	Other, please specify:	Not applicable	Don't know
HVAC								
Water heating								
In-unit lighting								
Common area lighting								
Interior decor								
Landscaping								
Other: specify								

[ASK ALL]

Q25. Property managers often note they fall in a continuum between providing reactive maintenance to providing preventative maintenance. For most of the buildings you personally manage, please move the slider to where do you fall in the continuum.

[SINGLE RESPONSE]

1. [CONTINUUM LINE] Reactive maintenance ----- preventative maintenance
2. It really depends on the building
98. Don't know

Q26. Why do you say that?

1. [OPEN-ENDED RESPONSE]

## TENANT RELATIONSHIPS

[ASK ALL]

Q27. What types of leases do your tenants have? Please select all that apply.

[MULTIPLE RESPONSE]

1. Triple net lease – tenant pays for utilities and all capital improvements to a space
2. Multi-tenant office net lease – tenants pay for all utility costs; building owners pay for capital costs
3. Gross lease – building owner pays for utilities
4. Fixed-base year lease (i.e., modified gross lease) – the building owner pays a portion of operating costs, defined as the costs at some base year, tenants pay for escalations in costs beyond this base year.
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK IF Q27 SELECTED MORE THAN 1 RESPONSE OPTION]

Q28. Which of these lease types is most common for your tenants?

[SINGLE RESPONSE]

1. [PIPE IN Q27 RESPONSE OPTION SELECTION 1]
2. [PIPE IN Q27 RESPONSE OPTION SELECTION 2]
3. [PIPE IN Q27 RESPONSE OPTION SELECTION 3]
4. [PIPE IN Q27 RESPONSE OPTION SELECTION 4]
98. Don't know

[ASK ALL]

Q29. What percentage of your buildings have individual electric meters for tenant spaces? Please select all that apply.

1. [FORCE NUMERIC RESPONSE]
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q30. For your buildings, in what proportion do you pay the utility costs directly versus the tenant pays the utility costs directly? [VERIFY TOTAL % ADDS UP TO 100%]

[SINGLE RESPONSE]

1. We pay all the utility costs directly [FORCE NUMERIC RESPONSE]
2. Tenants pay the utility costs directly [FORCE NUMERIC RESPONSE]
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q31. You noted you directly pay utility costs for [Q30\_%\_1] of your buildings. For these buildings, how do you allocate those costs to tenants?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q32. What factors do you consider when setting the rent?

1. [OPEN-ENDED RESPONSE]

[ASK ALL]

Q33. Prior to taking this survey, were you aware that Energy Trust of Oregon provides resources for property managers to make energy efficiency upgrades?

[SINGLE RESPONSE]

1. Yes
2. No
98. Don't know

[ASK ALL]

Q34. Have you ever participated in an energy efficiency program to make an upgrade to a building you manage?

[SINGLE RESPONSE]

1. Yes
2. No
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[ASK ALL]

Q35. What would you find helpful when making energy-related upgrades for the buildings you manage? Please select all that apply.

[MULTIPLE RESPONSE]

1. Rebate information
2. Information on what efficient options there are for a specific type of equipment
3. Help speaking to tenants
4. Help speaking with business owners
5. An energy audit
6. Presentations at trade organizations
7. Presentations at organizations like Building Owners and Managers Association (BOMA)
8. Presentations to your firm
96. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

## CLOSING

[ASK ALL]

Q36. We want to make sure we fully understand your perspective. If we have further questions for you, can we contact you to ask a few more in-depth questions? You would receive an additional incentive for participating.

[SINGLE RESPONSE]

1. Yes
2. No

[ASK IF Q36=YES]

What is the best email or phone number to reach you? [Open response]

[THANK AND TERMINATE FOR INELIGIBLE RESPONDENTS]

Thank you so much for your time. It seems you are not eligible to complete this survey. We sincerely thank you for your time and willingness to help us.