

Energy Upgrade Alameda County Incentives Application

In addition to the Energy Upgrade California incentives offered by PG&E, local governments are offering supplemental incentives for Stand-Alone Energy Assessments, Basic Package Upgrades and Advanced Package Upgrades.

These incentives are meant to support and supplement the PG&E incentives, so projects will only qualify for local Energy Upgrade incentives if they meet the requirements of the PG&E program (this does not apply to assessment-only incentives). See “Instructions for Participating in the Energy Upgrade California Local Government Incentive Programs” below for submission instructions and required documentation. Applications must be completed in their entirety and properly submitted per the instructions to be considered for an incentive.

The following countywide rebates are available for a limited time only (through February 2012) and apply to all projects conducted within Alameda County. They will be distributed on a first-come, first-serve basis.

Regional Incentive Types and Amounts

Project Type	Amount	Notes
Analysis (Assessment) Stand Alone	\$300	-Additive with Basic, Advanced Package incentives if applicable. -If you are doing an assessment as part of an advanced package project do not apply for this rebate separately.
Basic Package	\$1,000	
Advanced Package	\$2,000	-Projects applying for an advanced package incentive will receive \$2,300 upon completion of the project if no other assessment incentive has already been issued.



In addition to the regional incentives, the following local incentives are available for projects located in the cities below:

Local Incentive Types and Amounts

Property is Located in	Energy Assessment	Basic Package Upgrade	Advanced Package Upgrade
City of Alameda ¹	N/A	N/A	Varies by energy savings (percent electricity savings)
City of Hayward ²	\$250 (only when upgrade work follows)	\$750	\$1,500 with 15% savings \$2,000 with 20% savings or more
City of Piedmont	\$190	\$590	\$590
City of Pleasanton ³	N/A	\$500 for Project Upgrade with Total Costs Under \$10,000	\$1,000 for Project Upgrade with Total Costs Over \$10,000
City of San Leandro ⁴	\$250	\$400	\$250-\$500 (plus assessment incentive)
Unincorporated Alameda County ⁵	\$250	\$500	\$500

¹Alameda Municipal Power provides electricity to Alameda residential customers and will be providing the incentive for any electric savings achieved from an advanced package project. For all Alameda City properties, PG&E will still provide the incentive for any natural gas-related savings. Contractors will be required to submit to both incentive programs for homeowners to receive a “full” incentive for the project.

² The City of Hayward has an alternative incentive for homeowners unable to do a Basic Package Upgrade. See <http://www.hayward-ca.gov/forums/EnergyIncentive/Energyresidential.shtm> for details.

³The city of Pleasanton also offers free/discounted water conservation measures and a \$1000 incentive for solar PV installations 1.5 kW or higher. See <http://www.PleasantonGreenScene.org> for details.

⁴The City of San Leandro has additional incentives for Green Building Labeling and Do It Yourself projects. See <http://www.sanleandro.org/depts/cd/bldg/eecbg/default.asp> for details.

⁵ Homeowners will apply for the Unincorporated Alameda County incentives directly. Contact “info.weatherization@acgov.org” for more information. Do not use this application to apply for Unincorporated Alameda County’s local incentives.



Upgrade Information

Please answer the following questions:

1. Where is your property located?

- City of Alameda City of Hayward City of Piedmont
 City of Pleasanton City of San Leandro Other Cities in Alameda County/Unincorporated County

2. What type of incentive are you applying for? Check all that apply.

- Energy Assessment Basic Package Upgrade Advanced Package Upgrade

3. Property Information

Property Address: _____

Application Date: _____

Property Owner Name: _____

Owner/Applicant Address: _____

Email Address: _____

4. Contractor Information

Contractor Name: _____

Company: _____

Email: _____

Phone: _____

5. If funding is not currently available, would you like to be placed on the waiting list? Yes No



6. For advanced package upgrades only, what are the modeled energy savings (% BTU reduced)?

- 15% 20% 25% 30% 35% 40% or higher

7. What year was the property built? _____

8. What is the total job cost? (Estimated or Actual) \$ _____

General Terms and Conditions:

Eligibility

1. The property undergoing an upgrade must be located within Alameda County. If local incentives are applicable, the property must be located within the city providing the local incentive.
2. For any of the Energy Upgrade local incentives, the energy assessment and upgrade work must be performed to the standards and procedures of the PG&E Whole House Program (Energy Upgrade California), including, but not limited to:
 - i. Use of PG&E Whole House Program participating contractors
 - ii. Use of PG&E Job Reporting Template
 - iii. Standards for qualifying energy assessments
 - iv. Upgrade specifications for Basic and Advanced Package Upgrades
 - v. Pre and post-retrofit modeling of energy savings for Advanced Package Upgrades
 - vi. Compliance with the PG&E Quality Assurance program
 - vii. Any other requirements of the PG&E Whole House Program
3. Project eligibility for a local incentive is based upon a post-upgrade review by PG&E, the local government agency in which the property undergoing retrofit is located, and ABAG. A confirmed program reservation does not guarantee that a project is eligible for an incentive.
4. Project eligibility will depend upon National Historic Preservation standards established by the California Office of Historic Preservation, Department of Energy and California Energy Commission. If a property is 45 years or older, it may not qualify for an incentive if the project scope violates historic preservation standards. Violations may include ground penetration or installation of measures visible from the outside of the property including, but not limited to, replacement of windows and replacement of doors.
5. The Contractor is solely responsible for ensuring that the installed energy-saving measures meet all applicable building codes, zoning laws, local, state, and federal requirements, and other relevant requirements. Contractor is responsible for any applicable permits as required by aforementioned code/law.



6. Regional incentives are available only for projects that have completed work between October 12, 2011 and February 28, 2012. For stand-alone assessment incentives, "completed work" is defined as completion of an energy assessment and completion of a resulting energy model. For project incentives, "completed work" is defined as receipt of a post-installation approval notice from the PG&E Whole House Program for a basic or advanced package project.

Incentives

1. Incentive amounts will be determined by the actual installed scope of work as described on the PG&E Post-Retrofit Job Reporting Template or local government permit, regardless of the scope of work reported to the program during the incentive reservation period. If funds are not available to meet the full incentive amount for the installed scope of work, the incentive amount will be the maximum available funds remaining.
2. Incentive amounts may not exceed actual costs, including the combination of any local and regional incentives. Where total incentives exceed actual costs, the incentive amount will be reduced to ensure total incentives do not exceed project costs.
3. Funds for incentives are limited and available on a first-come, first-served basis. Jobs must be completed and final paperwork submitted by 2/28/2012 for consideration.
4. The energy assessment, all improvement work, and all invoices and other required documentation must be completed and submitted to the administrator no later than 60 days after the reserved date, unless an extension has been granted by the incentive administrator in its sole and absolute discretion, in which case the deadline shall be 90 days. Projects that have been denied due to an expired reservation will not be able to reapply for an incentive through this program.
5. ABAG, ACWMA, the local government agency in which the property undergoing retrofit is located, and their agents are not responsible for lost documentation pertaining to this application.

Data Release

Please complete the following, filling in all blank spaces with the appropriate information

In order to receive funding for an upgrade incentive under the local government program, I, _____ [print name of Owner], hereby authorize ("Authorization") information and data regarding my property and the energy efficiency measures that I have installed or plan to install through the program to be released to the City of _____ (fill in City in which property undergoing retrofit is located), the Alameda County Waste Management Authority (ACWMA), the Association of Bay Area Governments (ABAG) and their agents who are implementing American Recovery and Reinvestment Act (ARRA) activities within the nine-county San Francisco Bay Area. I understand that this information will be used for the purposes of evaluating and planning energy efficiency programs and to comply with existing or future regulations. Information and data specifically identifying my property will not be included in any report prepared for distribution to the public at large or posted on the internet, and will not be distributed to any parties not involved in administering and implementing these programs except as may be required by law. Information and data concerning my property may be included as part of aggregate reports in connection with evaluating and planning energy efficiency programs that may be prepared for public distribution. I hereby release, hold harmless, and indemnify the local government agency in which the property undergoing retrofit is located, ACWMA, ABAG and their agents from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information pursuant to this Authorization; 2) the unauthorized use of this information; and 3) any actions taken pursuant to this Authorization.

I authorize release for the following PG&E gas account: _____ - _____



Releases and Indemnification

I acknowledge that the local government agency in which the property undergoing retrofit is located, ACWMA, ABAG and their agents have developed the Energy Upgrade California incentive program solely for the purpose of assisting with the financing of energy efficiency improvements, and that they have no responsibility of any kind for, and shall have no liability arising out of, the performance of, any service, installation, operation, or maintenance of the authorized improvements. I agree that my successors in interest and I shall be solely responsible for the installation, operation, financing, refinancing and maintenance of the improvements.

I agree to release, defend, indemnify, and hold harmless the City of _____ (fill in City here), Alameda County Waste Management Authority, the Association of Bay Area Governments, and their agents including their officers, directors, employees, volunteers, from and against any and all claims, actions, demands, costs, damages or lawsuits, arising out of or connected with my participation in this program.

Changes in the Program Terms; Severability

ACWMA and ABAG reserve the right to change the Terms and Conditions at any time without notice. If any Terms are determined to be unlawful, void, or for any reason unenforceable, then such provisions shall be deemed severable from the remaining Terms and they shall not affect the validity or enforceability of any remaining provisions.

Property Owner Acknowledgement of Terms and Conditions:

This acknowledges that I have read and understand the Terms and Conditions ("Terms and Conditions"). I agree to comply with these Terms and Conditions. If I fail to submit sufficient documentation or otherwise violate the Terms and Conditions, I will voluntarily forfeit my position on the program list and subsequent rebate allotment. The energy assessment or upgrade must be in accordance with the program standards for grant funds to be distributed. Failure to comply with any of the terms or conditions may result in dismissal from the program and loss of rebate.

Signature of owner

Name of owner (please print) and Date



Specific Terms and Conditions

If applying for the city incentives, property owners, contractors, and their agents must review the Specific Terms and Conditions for the local government in which the property is located. Specific Terms and Conditions are available by clicking on the following links:

- City of Alameda No specific terms and conditions have been set for the City of Alameda’s incentives.
- City of Hayward <http://www.hayward-ca.gov/forums/EnergyIncentive/Energyresidential.shtm>
- City of Piedmont <http://www.ci.piedmont.ca.us/climate.shtml>
- City of Pleasanton <http://www.PleasantonGreenScene.org>
- City of San Leandro <http://www.sanleandro.org/depts/cd/bldg/eecbg/default.asp>

Property Owner Acknowledgement of Specific Terms and Conditions:

This acknowledges that I have read and understand the Specific Terms and Conditions (“Terms and Conditions”) for the City of _____ (fill in city name). I agree to comply with these Terms and Conditions. If I fail to submit sufficient documentation or otherwise violate the Terms and Conditions, I will voluntarily forfeit my position on the program list and subsequent rebate allotment. The energy assessment or upgrade must be in accordance with the City’s program standards for grant funds to be distributed. Failure to comply with any of the terms or conditions may result in dismissal from the program and loss of rebate.

Applicant signature

Applicant name (please print) and Date

Signature of owner (if different than applicant)

Name of owner (please print) and Date



Instructions for Participating in the Energy Upgrade California Regional Incentive Program

Stand Alone Analyses/Assessments

If the contractor intends to perform an assessment as part of an advanced package project, they should not apply for a stand-alone assessment incentive. They should apply for an advanced package incentive only, and the assessment incentive will be added to the total incentive amount.

To claim the stand-alone analysis/assessment incentive the contractor or their agent must:

1. Complete an assessment using PG&E –approved energy modeling software.
2. Complete this application in its entirety.
3. Attach the following documentation to the application:
 - a. W-9 for the payee
 - b. An invoice for the work showing the total project cost less incentives and indicating paid status
4. Submit this completed application in its entirety along with the above documentation via one of the following methods:
 - Email: eurebates@bki.com
 - Fax: (510) 225-3943
 - Mail: Energy Upgrade Bay Area Incentives, Bevilacqua-Knight, Inc.
1000 Broadway, Suite 410
Oakland, CA 94607
5. Upon receipt of the documentation, the incentive administrator will notify the applicant of receipt within 2 business days.
6. The administrator will review the documentation for completeness and accuracy. If there is a problem with the documentation, the administrator may request additional information to be submitted.
7. At any point, the applicant may request a status update by contacting the regional administrator via the email above.
8. Upon approval of submitted documentation, the administrator will notify the local and regional agencies paying incentives, who will conduct internal review, potentially including verification of property owner Tax ID information.
9. Once the incentive has been approved and the payment is sent to the homeowner, the regional administrator will notify the applicant and/or property owner of the project's approval.



Basic or Advanced Package Projects

Reserving an Incentive

To reserve an incentive the contractor or their agent must:

1. Complete an assessment -or- determine that the project will be a Basic Package upgrade through the PG&E Whole House Program.
2. Submit all relevant project documentation to PG&E for pre-installation review.
3. Complete this application in its entirety, ensuring that the proposed scope of work abides by the Terms and Conditions. You do not need to wait for the PG&E authorization to proceed before you submit this application.
4. Attach the following documentation to the application:
 - a. W-9 for the payee
 - b. A completed pre-installation PG&E Job Reporting Template
5. Submit this completed application in its entirety along with the appropriate documentation via one of the following methods:
 - Email: eurebates@bki.com
 - Fax: (510) 225-3943
 - Mail: Energy Upgrade Bay Area Incentives, Bevilacqua-Knight, Inc.
1000 Broadway, Suite 410
Oakland, CA 94607
6. Upon receipt of the documentation, the incentive administrator will notify the applicant of receipt within 2 business days.
7. The administrator will review the documentation for completeness and accuracy. If there is a problem with the documentation, the administrator may request additional information to be submitted.
8. Once the paperwork has been confirmed, the administrator will assign a project ID number and notify the applicant that the reservation has been established.
9. At any point, the applicant may request a status update by contacting the regional administrator via the email above.

Note: A confirmed reservation does not automatically qualify a project for an incentive. Projects will be reviewed for eligibility once the retrofit work has been completed.



Claiming the Reserved Incentive

To claim a reserved incentive the contractor or their agent must:

1. Complete the upgrade scope of work as indicated in the PG&E Energy Upgrade Approved Post-Retrofit Job Reporting Template. Note that, if the scope varies from the scope indicated in the reservation, the resulting incentive will be changed to reflect the actual installed measures as possible given remaining funds.
2. Complete and submit the PG&E Energy Upgrade Post-Retrofit Job submissions to the PG&E Whole House program.
3. Once the PG&E Whole House Program administrator has approved the PG&E incentive, gather the following documentation:
 - a. PG&E **Approved** Post-Retrofit Job Reporting Template
 - b. A copy of the PG&E incentive approval notification
 - c. An invoice for the work showing the total amount less incentives and indicating paid status
 - d. The local permit number or a copy of the local permit obtained for the work (advanced package only, where scope requires a permit)
4. Submit these documents via one of the following methods:
 - Email: eurebates@bki.com
 - Fax: (510) 225-3943
 - Mail: Energy Upgrade Bay Area Incentives, Bevilacqua-Knight, Inc.
1000 Broadway, Suite 410
Oakland, CA 94607
5. Upon receipt of the documentation, the incentive administrator will notify the applicant within 2 business days.
6. The administrator will review the documentation for completeness and accuracy. If there is a problem with the documentation, the administrator may request additional information to be submitted.
7. Upon approval of submitted documentation, the administrator will notify the participating local government to conduct post-retrofit local review for their local incentive requirements. The local government will conduct local review and potentially contact the applicant to discuss specific points of the application.
8. At any point, the applicant may request a status update by contacting the regional administrator via the email above.
9. Upon approval of submitted documentation, the administrator will notify the local and regional agencies paying incentives, who will conduct internal review, potentially including verification of property owner Tax ID information.
10. Once the incentive has been approved and the payment is sent to the homeowner, the regional administrator will notify the applicant and/or property owner of the project's approval.