Energy Upgrade California

Through the Energy Upgrade California Program, Federal, State and local utilities offer incentives that make energy-saving house projects affordable

- Encouraged customers and contractors to approach the house as a collective savings opportunity rather than a group of individual systems

- Solutions to overcome participation barriers with:
  - Rebates/incentives
  - Financing
  - Education/awareness
  - Contractor training
Program Overview

Utility Rebate Objectives:

- Help to offset high costs
- Rebate from a trusted energy advisor
- Create line of sight between single measure rebates and comprehensive improvements
- Aggregate current single measure rebates in larger and comprehensive rebate offering
Basic Package

- Attic Insulation
- Low Flow Shower Head
- Insulation of Domestic Hot Water Pipes
- Attic Air Sealing
- Duct Sealing
- Combustion Safety Test

Incentive $1,000

Advanced Package

- Diagnostic Audit
- Comprehensive Work Scope
- Basic Measures
- Combustion Safety Test

Incentive up to $4,000

- Wall Insulation
- Proper sizing of heating and cooling system
- Proper sizing of hot water system
- Additional energy saving measures
Rebates

<table>
<thead>
<tr>
<th>Savings: % Reduction</th>
<th>Rebate Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic Package: 10%</strong>*</td>
<td>$1,000</td>
</tr>
<tr>
<td>10% (SCE/SCG/SDG&amp;E)</td>
<td>$1,250</td>
</tr>
<tr>
<td>15% (PG&amp;E)</td>
<td>$1,500</td>
</tr>
<tr>
<td>20%</td>
<td>$2,000</td>
</tr>
<tr>
<td>25%</td>
<td>$2,500</td>
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<tr>
<td>30%</td>
<td>$3,000</td>
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<tr>
<td>35%</td>
<td>$3,500</td>
</tr>
<tr>
<td>40%</td>
<td>$4,000</td>
</tr>
</tbody>
</table>

* Average savings.

Advanced Package

List of possible measures include, but are not limited to the following:

- Basic Package Measures
- Wall and Floor Insulation
- Water Distribution System
- Heating Equipment
- Cooling Equipment
- Variable Speed Motor Air Handlers
- Cool Roofs
- Crawl Space Insulation
- Radiant Barriers
- Refrigerant Charge and Airflow
- Energy Efficient Windows
- And more...
**Customer Perspective**

- Coordinated messages from utilities, local governments, and contractors
- Benefits:
  - Increased comfort
  - Energy savings & lower annual utility costs
  - Contractor facilitates application process
  - Complete all work at once
- A customer incentive check from their utility
  - Split incentive in joint territories
  - Customer can designate contractor as payee (except in PG&E territory)
- Quality assurance
- Combustion safety testing

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**Customer Eligibility**

- Eligibility:
  - Utility customer
  - Single family residential customer
  - Work performed by participating contractor(s)
  - Meet all program specifications and guidelines

- Best Candidates for Participation:
  - Customers with the ability to reduce energy usage, through basic or advanced upgrades, by at least 10%
Contractor Requirements

Including but not limited to:

• Basic and Advanced:
  – CSLB License in the appropriate specialty
  – Bonding, insurance and in good standing
  – Signed Contractor Participation Agreement
  – Completion of Program Orientation Course
  – Combustion Safety test performed by a certified BPI Analyst

• Advanced:
  – General Contractor’s license
  – BPI Certification of individuals on payroll
  – Training and proven ability to operate CEC-qualified software to generate comprehensive work scopes and recommendations

Quality Assurance

• Contractor screening
• Emphasis on combustion safety
• Participant and partner satisfaction surveys
• Third-party in-field verification (aligned with Home Performance with ENERGY STAR®)
  – Tier 1 – 3 of the first 5 jobs completed by a new contractor
  – Tier 2 – After the first 5 jobs, at least 4 of the next 20 jobs
  – Tier 3a – 5% of jobs (after 25 jobs)
  – Tier 3b – 2% of jobs by BPI-Accredited contractors (after 25 jobs)
• Management of corrective actions through program implementers
Statewide Materials

- Contractor Materials
  - 3-Piece Sales and Marketing Toolkit
    - What is Energy Upgrade California?
    - Reasons/benefits of a retrofit
    - Checklist to help clients determine qualifications
  - Email Templates
    - Acquisition, warm-lead follow-up, and closing sale thank you
  - Fact Sheet
- Customer Facing Materials
  - Brochure
  - Program Posters
  - Direct Mail Piece
  - Print Ad

EUC Program Brochure

Why should you upgrade?

- Improve comfort
- Increase property values
- Save money
- Reduce energy usage
- Improve system efficiency

What is a whole-home approach?

- Whole-home upgrading involves making comprehensive changes to the entire home, not just individual components.
- The goal is to optimize the performance of the entire system, rather than treating each component in isolation.

How to get started?

- Schedule a free home energy audit to identify areas for improvement and potential savings.
- Contact local contractors for quotes and services.
- Consider financing options for energy upgrades.
- Consult with local utility companies for rebates and incentives.

Reduce energy use. Save money. Create jobs.
How to Participate:

- Whole House Program:
  - To find a participating home performance contractors visit the Energy Upgrade California website: www.EnergyUpgradeCA.org

- Utility Websites:
  - PG&E - www.pge.com/EnergyUpgradeCA
  - SCE - www.sce.com/residential/rebates-savings/home_upgrade_projects
  - SCG - www.socalgas.com/upgrade
  - SDG&E - www.sdge.com/residential/EnergyUpgrade