

Energy Upgrade California in San Mateo County: Frequently Asked Questions

Energy Upgrade California is an exciting new statewide program that can help you save money on home energy efficiency upgrade projects. These projects can potentially lower your utility bills, increase your home's energy and water efficiency, and create a more comfortable home.

The following are responses to common questions about the Energy Upgrade program. If you have more questions, please visit the website at www.EnergyUpgradeCA.org to learn more. As additional information becomes available, it will be posted on the website. Sign up for Energy Upgrade California e-updates to receive newsletters and updates about new information as soon as it becomes available!

Energy Upgrade California Program Overview

WHAT IS THE PURPOSE OF ENERGY UPGRADE CALIFORNIA?

Key goals include:

- Encourage homeowners to take a “whole house” approach to energy efficiency by addressing the entire house as a system
- Work with utility companies to provide property owners with rebates and incentives that make it easier to complete home efficiency upgrades
- Reduce greenhouse gases, dependence on fossil fuels and the adverse impacts of climate change
- Boost the economy by creating thousands of local construction jobs in communities throughout California

Rebates and Incentives

WHAT KIND OF REBATES AND INCENTIVES ARE AVAILABLE?

Rebates and incentives in San Mateo County include utility company incentives (PG&E), American Reinvestment and Recovery Act rebates, city rebates and federal tax credits. Depending on your energy savings, you could receive more than \$8,000—for improvements like new heating and cooling systems or green building enhancements.

www.EnergyUpgradeCA.org.

ARE ENERGY EFFICIENCY UPGRADES ELIGIBLE FOR TAX CREDITS?

The 2011 tax credit is 10% of improvement cost, up to \$500 maximum. Some restrictions apply. More information is available in the local rebate and incentive section of

www.EnergyUpgradeCA.org.

HOW LONG ARE ENERGY UPGRADE CALIFORNIA REBATES AVAILABLE?

The rebates provided by PG&E are available through December of 2012.

The County of San Mateo's funds for matching incentives must be allocated by March of 2012. This means that to receive the County's matching incentive for your project, it must be completed by March 1, 2012. Matching incentives are available on a first-come first-serve basis while funds are available.

“Whole House Approach”

WHAT IS THE “WHOLE HOUSE” APPROACH?

Energy Upgrade encourages you to think of your house as a complete system working together—a “whole house”—rather than individual elements. Increasing your home's efficiency is more than switching out light bulbs or adding low-flow showerheads—it's approaching your home as a complete system, with heating, air-conditioning, water and other systems working together more efficiently to help lower your energy use.

WHAT ARE SOME OF THE BENEFITS OF THE “WHOLE HOUSE” APPROACH?

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- Increase energy and water efficiency
- Lower utility bills
- Create a more comfortable home
- Improve indoor air quality
- Potentially increase home value
- Reduce impact on the environment
- Save important energy and water resources for the future

Program Description

WHAT TYPES OF ENERGY EFFICIENCY UPGRADES QUALIFY FOR REBATES?

The program consists of two Upgrade Packages: **Basic** and **Advanced**. These packages provide straightforward options that qualify for rebates.

- The program's **Basic Upgrade Package** consists of seven required measures (estimated to achieve approximately 10% energy savings) with rebates and incentives of up to \$1,000 from PG&E and a matching rebate of \$1,000 from the County of San Mateo*.
 - Attic air sealing
 - Attic insulation
 - Duct sealing
 - Hot water pipe insulation
 - Low-flow showerhead with thermostatic control
 - Smoke alarms and carbon monoxide detectors
 - Combustion safety testing
- The program's **Advanced Upgrade Package**, in addition to the Basic Package measures, requires a combination of customized energy efficiency elements that achieve at least 15% to 40% in energy savings. Depending on your energy savings, you could receive from \$1,500 to more than \$4,000 from PG&E and a matching rebate of \$1,500-\$4,000 from the County of San Mateo*. You must complete all of the elements required in the Basic Upgrade Package to participate in the Advanced Upgrade Package. This Package may consist of some of the following applicable measures:
 - High efficiency furnace
 - Energy-efficient cooling systems
 - Energy-efficient water heaters
 - Wall insulation
 - Energy-efficient pool pumps
 - Dual pane energy-efficient windows
 - Cool roofs

*Rebates from the County of San Mateo are available on a first come, first serve basis. For more information see **San Mateo County Additional Incentives**

- If you are planning to complete either the Basic or Advanced Upgrade Package, you can add separate **Enhanced Options** such as solar and renewable energy measures, green building or water efficiency measures. These options are not eligible for utility incentives, but may qualify for rebates and incentives from other sources. Talk to your Participating Contractor about additional rebates or go to www.EnergyUpgradeCA.org to find more options.

Getting Started

ACTION STEPS

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1. Go to the program website and find your local program, learn about benefits, details and rebate information: www.EnergyUpgradeCA.org.
2. Select a Participating Contractor from Energy Upgrade California's online contractor database. You must work with a Participating Contractor to receive the Energy Upgrade rebates and incentives.
4. Work with your Participating Contractor to further discuss the upgrade packages and confirm your Upgrade Package choice
5. Receive your rebates and incentives!

Participating Contractors

WHAT IS A PARTICIPATING CONTRACTOR?

Participating Contractors have been specifically trained for Energy Upgrade California and have met required qualifications to be part of the program. All Energy Upgrade Participating Contractors have a valid California contractor's license, appropriate bonding, and have specified certifications and/or training for the work being performed. In addition, Participating Contractors are experts in energy efficiency and are certified by the Building Performance Institute (BPI). BPI is an independent, nonprofit organization that works with the Department of Energy and the Environmental Protection Agency to develop standards for home performance and weatherization improvements. As part of the Energy Upgrade program, BPI trains Participating Contractors in the "whole house" concept and the comprehensive "whole house" diagnostic assessments.

DO I HAVE TO USE A PARTICIPATING CONTRACTOR?

Yes, you must work with an Energy Upgrade Participating Contractor to complete your upgrade and qualify for a rebate. You may choose from a large pool of Participating Contractors who can help you plan and complete your project, and maximize energy savings. A Participating Contractor can also help you maximize all available rebates, and can assist you in completing and submitting the required paperwork.

HOW DO I FIND A PARTICIPATING CONTRACTOR?

Energy Upgrade California's online Participating Contractor database connects you with local Participating Contractors in your area. Go to www.EnergyUpgradeCA.org and enter your zip code or county to find your local program information and view the Participating Contractor database.

WHAT QUALITY CONTROL STANDARDS ARE IN PLACE?

A rigorous quality assurance system ensures that Energy Upgrade projects meet program standards. Independent third-party inspectors will conduct both scheduled and spot checks of completed work. Work will be tested to ensure that improvements meet the requirements of the national Home Performance with Energy Star program.

THE WEBSITE PROVIDED A LIST OF SEVERAL PARTICIPATING CONTRACTORS. CAN I GET ESTIMATES FROM MORE THAN ONE CONTRACTOR?

Yes, you may receive estimates from multiple Participating Contractors. The online directory allows you to search for Participating Contractors in your area. The contractor who completes your energy assessment should also complete your project.

CAN I DO THE WORK MYSELF?

No, you must work with an Energy Upgrade Participating Contractor to complete your upgrade. You may select from a local pool of Energy Upgrade Participating Contractors listed at www.EnergyUpgradeCA.org. Upgrades completed by homeowners do not qualify for rebates.

Energy Assessments

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WHAT IS A HOME ENERGY ASSESSMENT?

A professional home energy assessment (sometimes referred to as an energy “audit”) is a comprehensive diagnostic of your home’s energy efficiency that identifies opportunities for improvement and helps you create a customized upgrade that works for you.

DO I NEED AN ASSESSMENT OF MY HOUSE IN ORDER TO PARTICIPATE IN THE PROGRAM?

It depends on which Upgrade Package you select. The Basic Upgrade Package *does not require* an energy assessment. The Basic Package requires completion of seven upgrade elements.

The Advanced Upgrade Package *requires* a home energy assessment. The Advanced Package allows you to select from an assortment of different upgrade measures in order to achieve a 15% to 40% energy reduction. The assessment will establish a baseline for your home that will be used to quantify how much energy your completed upgrade saves.

HOW CAN I FIND SOMEONE TO DO AN ENERGY ASSESSMENT OF MY HOME?

To conduct a home energy assessment you must use a Participating Contractor or a Home Energy Rating System (HERS) Program rater. The program website at www.EnergyUpgradeCA.org has a list of participants.

HOW MUCH DOES THE REQUIRED HOME ENERGY ASSESSMENT COST?

A home energy assessment will cost approximately \$250 to \$500. This assessment may qualify for a rebate depending on your location. Check www.EnergyUpgradeCA.org to see if you qualify for a home energy assessment rebate.

WHAT IS THE PROCESS FOR APPLYING FOR A REBATE?

Your Participating Contractor can assist you in completing and submitting the required paperwork. It can also be downloaded from www.EnergyUpgradeCA.org or obtain the forms from a Participating Contractor.

HOW MUCH CAN I EXPECT TO INVEST UPFRONT IN IMPROVEMENTS TO COMPLETE ONE OF THE UPGRADE PACKAGES?

The cost of upgrades can vary significantly. Your Participating Contractor can advise you on options and your associated costs. Simple upgrades in the Basic Package will have lower costs than those in the Advanced Package. However, the Advanced Package offers larger rebates associated with larger energy savings.

I RECENTLY COMPLETED AN ENERGY EFFICIENCY UPGRADE TO MY HOME. CAN I PARTICIPATE IN THE ENERGY UPGRADE CALIFORNIA PROGRAM AND GET A REBATE?

Work previously completed is not eligible. A Participating Contractor can help you determine which elements you could complete as part of Energy Upgrade California.

Financing

IS THERE FINANCING AVAILABLE TO HELP WITH UPFRONT COSTS OF HOME ENERGY EFFICIENCY UPGRADES?

Energy Upgrade California is working with lenders to develop opportunities for homeowners to finance individual projects. To sign up for updates on upcoming financing options visit: www.co.sanmateo.ca.us/energyupgrade.

San Mateo County’s Additional Incentives

HOW MANY REBATES ARE AVAILABLE?

The County of San Mateo has enough funding to provide approximately 100 rebates for Energy Upgrade projects.

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HOW CAN I RESERVE MY REBATE FOR MY PROJECT?

To reserve your matching incentive from the County of San Mateo, your **Participating Contractor** must submit the following documentation to the San Mateo County Energy Upgrade program.

- Incentive Application Form
- Copy of the contract between you and your contractor
- Copy of the Job reporting document (showing a detailed scope of work and modeled energy savings) submitted to PG&E to receive rebates for Energy Upgrade California projects
- Copy of the Notice to Proceed (showing project authorization by PG&E)

Once documentation is received, your rebate amount (based on modeled energy savings for your project) will be reserved for you and an Application Number will be issued.

Reservations apply to the County's matching incentive only and are not necessary for the PG&E portion of your rebate.

HOW LONG DO I HAVE TO COMPLETE MY PROJECT AFTER I HAVE RECEIVED THE RESERVATION FOR MY SAN MATEO COUNTY (SMC) MATCHING INCENTIVE?

90 days. If more time is needed, your **Participating Contractor** will need to file an extension on your behalf.

HOW DO I CLAIM MY SMC MATCHING INCENTIVE AFTER MY PROJECT IS COMPLETED?

To claim your matching incentive from the County of San Mateo, your **Participating Contractor** must submit required documentation to the San Mateo County Energy Upgrade program.

These documents include:

- Copy of Job reporting document with completed post-retrofit worksheet
- Copy of Notice of Completion with final rebate approval from Energy Upgrade California
- Copy of all required building permits pulled for project

HOW DO I RECEIVE MY REBATE CHECK?

You can choose whether to have the rebate check sent to you or your Participating Contractor.

If you elect to have the rebate check sent to your **Participating Contractor**, this will allow you to receive an immediate discount on your project.

If you elect to be paid directly, the County of San Mateo will require you submit the following documentation in order to process your payment.

- IRS W-9 tax form

Your preference for payment method will be indicated on your application form submitted to the San Mateo County Energy Upgrade program.

I ALREADY COMPLETED AN ENERGY UPGRADE CALIFORNIA PROJECT AND RECEIVED MY REBATES FROM PG&E, HOW CAN I ALSO RECEIVE THE NEW COUNTY MATCHING INCENTIVE?

Your Participating Contractor will need to complete an Incentive Application Form for your project and provide the following documentation to the San Mateo County Energy Upgrade program:

- Copy of Job reporting document with completed post-retrofit worksheet
- Copy of Notice of Completion with final rebate approval from Energy Upgrade California

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- Copy of all required building permits pulled for project