

Local Government Incentive Application

In addition to the Energy Upgrade California incentives offered by PG&E, local governments are offering additional incentives for energy assessments as well as Basic and Advanced Package Upgrades. The following incentives are available:

Property is Located in	Eligible Projects	Incentive Amount
City of Albany	Energy Assessments Basic Package Upgrades Advanced Package Upgrades	-\$190 for Assessment Only -\$590 for Basic or Advanced Package Upgrade
City of Hayward ¹	Basic Package Upgrades Advanced Package Upgrades	-\$250 for Assessment (only when upgrade work follows) -\$750 for Basic Package Upgrade -\$1,500 for Advanced Package Upgrade with 15% savings -\$2,000 for Advanced Package Upgrade with 20% savings or more
City of Piedmont	Energy Assessments Basic Package Upgrades Advanced Package Upgrades	-\$190 for Assessment Only -\$590 for Basic or Advanced Package Upgrade
City of San Leandro ²	Energy Assessments Basic Package Upgrades Advanced Package Upgrades	-\$400 for Basic Package -\$250 for Assessment -\$250-\$500 for Advanced Package Upgrade (plus assessment incentive)

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. Applications must be completed in their entirety and properly submitted per the instructions to be considered for an incentive.

¹ 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.

² The 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.



Upgrade Information

Please answer the following questions:

1. Where is your property located?

City of Albany City of Hayward City of San Leandro City of Piedmont

2. Property Information

Property Address: _____
Application Date: _____
Property Owner Name: _____
Owner/Applicant Address: _____
Email Address: _____

3. The property is a (check only one)³:

Single-Family Home (Including Homes with In-Law Units) Duplex 3-4 Unit Building

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

³ Only single-family homes are eligible for San Leandro incentives.



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

- Energy Assessment, Basic Package Upgrade, Advanced Package Upgrade

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

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

8. What year was the property built? _____

9. Is the property occupied by the owner? Yes No

Data Release Authorization:

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 local government in which the property undergoing retrofit is located, its agents, and the Alameda County Waste Management Authority (ACWMA) and its agents who are implementing American Recovery and Reinvestment Act (ARRA) activities within Alameda County. 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 may 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 including posting on the internet. I hereby release, hold harmless, and indemnify the local government in which the property undergoing retrofit is located, ACWMA 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 electric account: _____ - _____

Applicant signature Applicant name (please print) and Date

Signature of owner (if different than applicant) Name of owner (please print) and Date

4 The City of Hayward does not provide incentives for stand-alone energy assessments.
5 To qualify for the City of San Leandro's incentive, the property must be occupied by the owner.



General Terms and Conditions

Eligibility

1. The property undergoing an upgrade must be located within the city sponsoring the incentive program.
2. The property owner must be current in the payment of all obligations secured by the subject property.
3. 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:
 - a. Use of participating contractors
 - b. Use of PG&E Job Reporting Templates
 - c. Standards for qualifying energy assessments
 - d. Upgrade specifications for Basic and Advanced Package Upgrades
 - e. Pre and post-retrofit modeling of energy savings for Advanced Package Upgrades
 - f. Compliance with the PG&E Quality Assurance program
 - g. Any other requirements of the PG&E Whole House Program
4. The person undertaking the improvement work must obtain all necessary building permits from the local government in which the property is located.
5. Project eligibility for a local incentive is based upon a post-upgrade review by PG&E and the participating local government. A confirmed program reservation does not guarantee that a project is eligible for an incentive.
6. Incentive amounts will be determined by the actual installed scope of work as described on the PG&E Post-Retrofit Job Reporting Template, regardless of the scope of work reported to the program on the PG&E Pre-Retrofit Job Reporting Template. If funds are not available to meet the full incentive amount for the installed scope of work, the local government will disburse the maximum available funds for the incentive.
7. Incentive amounts may not exceed actual costs.
8. The energy assessment, all improvement work, and all invoices and other required documentation must be completed and submitted to the administrator no later than 120 days after the reserved date unless an extension has been granted by the local government in its sole and absolute discretion, in which case the deadline shall be 180 days.

Releases and Indemnification

I acknowledge that the City, the Alameda County Waste Management Authority, and their agents have developed the Energy Upgrade California 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 appropriate city), the Alameda County Waste Management Authority, and their agents including their officers, directors, employees, volunteers, and agents, 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

The City of _____ (fill in appropriate city), and Alameda County Waste Management Authority reserve the right to change the program Terms 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 program Terms and they shall not affect the validity or enforceability of any remaining provisions.

Property Owner Acknowledgement of General Terms and Conditions:

This acknowledges that I have read and understand the General 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.

Applicant signature

Applicant name (please print) and Date

Signature of owner (if different than applicant)

Name of owner (please print) and Date



Specific Terms and Conditions

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 Albany <http://www.albanyca.org/index.aspx?page=876>
- 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 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 Local Government Incentive Programs

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 the assessment and/or Pre-Retrofit Job Reporting Template to the PG&E Whole House Program.
3. Complete this application in its entirety, ensuring that the proposed scope of work abides by the General Terms and Conditions and the Specific Terms and Conditions of the local government incentive program to which they are applying.
4. Attach the following documentation to the application:
 - a. Pre-Retrofit Assessment Report (ECON-1 and ECON-2 reports or equivalent-if applicable)
 - b. PG&E Pre-Retrofit Job Reporting Template (for Basic and Advanced Package upgrades)
5. Submit this completed application in its entirety along with the appropriate documentation via one of the following methods:
 - Email: jstrunin@bki.com
 - Fax: (510) 291-9595
 - Mail: Jonathan Strunin
Bevilacqua-Knight, Inc.
1000 Broadway, Suite 410
Oakland, CA 94607
6. Upon receipt of the documentation, the administrator will notify you of receipt and 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. Once the paperwork has been confirmed, the administrator will assign a project ID number and notify the contractor that the reservation has been approved. 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.
8. **For stand-alone assessments only**-Stand-alone assessments will be paid once the assessment report has been approved by the local government as long as funds are available. There is no further action to take to claim an assessment incentive.



Claiming the Reserved Incentive (Basic and Advanced Package Upgrades Only)

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 Report to the PG&E Whole House program.
3. Gather the following documentation:
 - a. The Project's ID number
 - b. PG&E **Approved** Post-Retrofit Job Reporting Template
 - c. Energy Pro Assessment report (ECON-1 and ECON-2 reports) or equivalent report
 - d. A copy of the PG&E incentive approval notification (an email is acceptable)
4. Submit these documents via one of the following methods:
 - Email: jstrunin@bki.com
 - Fax: (510) 291-9595
 - Mail: Jonathan Strunin
Bevilacqua-Knight, Inc.
1000 Broadway, Suite 410
Oakland, CA 94607
5. Upon receipt of the documentation, the administrator will notify you of receipt and review the documentation for completeness and accuracy. If there is a problem with the documentation, the administrator may request additional information to be submitted.
6. 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.
7. Once the local government has approved the incentive, they will notify the applicant and/or property owner.
8. The local government will disburse the incentive to the homeowner. The estimated time from claim submittal to incentive disbursement will vary depending upon the local review requirements.