



2018-2019 California Advanced Homes Program (2016 Title 24 Code projects)

Participant Handbook and Program
Agreement for Single-family and Multi-family
New Construction Projects



We're here to help builders today for tomorrow's environment.

Three of California's Investor-owned Utilities (IOUs), Southern California Edison, SoCalGas® and San Diego Gas & Electric Company are working together to help the building industry smooth the transition to the next energy code, design and develop more environmentally-friendly communities and support the State of California's efforts for new homes to reach Zero Net Energy (ZNE).

Our California Advanced Homes Program highlights best practices in energy efficiency, green building and sustainability, and offers generous financial incentives to help builders and architects create environmentally-friendly, energy-efficient communities for potential home buyers.

1. Program Overview

The 2018-2019 California Advanced Homes Program serves to encourage residential new construction builders to meet two visionary goals set forth by the California Public Utilities Commission (CPUC). The first is to help builders prepare for future code changes and build homes better-than-code. The second is for all new homes to reach ZNE.

2. Glossary of Terms

Throughout this document, acronyms of certain terms have been used to simplify instructions.

The following is a list of these terms

CABEC: California Association of Building Energy Consultants

CAHP: California Advanced Homes Program

CAHP EDR: The difference between the Standard Energy Design Rating and the Proposed Energy Design Rating plus any kickers.

CalCERTS: California Certified Energy Rating & Testing Services (HERS Provider)

CEA: Certified Energy Analyst

CEC: California Energy Commission

CF-1R: Certificate of Compliance

CF-2R: Certificate of Installation, go to www.energy.ca.gov and search for "Residential Manual"

CF-3R: Certificate of Field Verification and Diagnostic Testing, go to www.energy.ca.gov and search for "Residential Manual"

CHEERS: California Home Energy Efficiency Rating Services (HERS Provider)

CIR: CAHP Incentive Report

CPUC: California Public Utilities Commission

DELTA EDR: The difference between the Standard Energy Design Rating and the Proposed Energy Design Rating

DOE ZER: Department of Energy Zero-energy ready program

EDR: Energy Design Rating

HERS: Home Energy Rating System

HPA: High Performance Attics

HPF: High Performance Fenestration

HPW: High Performance Walls

IOU: Investor-owned Utility

IRF: Incentive Request Form

MECH-1-C: Mechanical Field Inspection Energy Checklist, usually for High-rise projects

MECH-INST: Mechanical Installation Certificate, usually for High-rise projects

MF: Multi-family

MFHR: Multi-family High-rise

MFLR: Multi-family Low-rise

NFRC: National Fenestration Rating Council

PERF-1: Performance Certificate of Compliance

Rater: Inspector certified by a CEC-approved HERS provider to provide third-party verification for Title 24 measures.

RNC: Residential New Construction

SF: Single-family

SHGC: Solar Heat Gain Coefficient

ZNE: Zero Net Energy (as defined by the CPUC)

ZNE-R: Zero Net Energy Ready

3. Introduction

CAHP is offered through a diverse portfolio of programs by the IOUs. Participation is open to single-family, low-rise and high-rise multi-family residential new construction built in a participating IOU service area. CAHP is a comprehensive residential new construction concept with a cross-cutting focus on sustainable design and construction, energy efficiency, demand reduction and emerging technologies. Through a combination of education, design assistance and financial support, CAHP works with building and related industries to exceed compliance with the California Code of Regulations, Title 24, Part 6, 2016 Building Energy Efficiency Standards for Residential and Nonresidential Buildings (Standards), to prepare builders for changes to the Standards and to create future pathways beyond compliance and traditional energy savings objectives.

CAHP is designed for the Performance-based Approach for compliance. Compliance with the 2016 Title 24 Standards must be demonstrated through the performance method utilizing approved California Energy Commission (CEC) compliance software. The documents must be created and signed by a 2016 Title 24 code Certified Energy Analyst (CEA). Compliance must be demonstrated for each building as a whole and may not group unrelated or detached buildings together.



4. General Requirements and Eligibility

The CAHP is funded under the auspices of the CPUC and funding, incentive levels and program requirements may be revised during the program cycle. Applicants must contact their assigned IOU representative prior to submitting an Incentive Agreement (Agreement) (see Section 8 for contacts).

4.1 Program Requirements

- 1 Incentives are only available to the participating builder for commodities (i.e., natural gas and electricity) that are provided by CAHP utilities.
- 2 Projects that are applying for incentives must submit an Agreement package, in compliance with Section 4.2, prior to any Home Energy Rating System (HERS) testing beginning or drywall installation. Please check with your HERS rater prior to submitting your Agreement packet to ensure the lots indicated on your Agreement and lot list are eligible. All participating units must be new construction dwellings and modeled accordingly.
- 3 Applicant agrees to not accept duplicate funding from multiple IOU-sponsored energy-efficiency programs for the same measures. Measures that save multiple fuel types can accept funding for EACH fuel type from ONE IOU.
- 4 Lots in a project must meet program requirements for plan and orientation to be eligible for incentives. Lots in a project that do not meet program requirements do not affect the eligibility of those that do.
- 5 For verification purposes, all projects must contract with a certified HERS rater, even if HERS measures are not required. The HERS rater will be required to enter project verifications into the HERS registry for the CAHP certificate. This includes verifications of non-HERS measures as applied in the project's specified registry.
- 6 Incentive payments are available only to owners, builders or developers named on the Agreement.
- 7 Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the program requirements. No payments will be made for any changes made to the unit that may affect compliance without prior written approval from your IOU representative.
- 8 Contact your IOU representative for additional program details and funding availability prior to submitting Agreements. The funding for this program is scheduled to expire December 31, 2019. Agreement is valid for 36 months from date of IOU acceptance. Unless the Incentive Request Forms (IRF) are submitted or an extension approval is granted within 36 months of program acceptance, any and all remaining incentive reservations could be lost.
- 9 In accordance with California Public Utilities Code Section 399.4(b), the customer (or their contractor) must provide the IOU with the proof of construction permit closure from the issuing agency before the IOU will pay any rebate or incentive for the purchase or installation of central air-conditioning, heat pumps, or related fans.

4.2 Program Process Overview

Contact your CAHP representative prior to submitting the Agreement and prior to construction to ensure that you have the most current CAHP information available. **Programs and/or incentive levels may be changed or cancelled without notice.** You will be appointed an IOU representative that will guide you through the entire process and to whom you will submit Agreement materials. Submit the following to your IOU representative for each plan type within the project:

- 1 A completed, original, and signed CAHP Incentive Agreement postmarked or received no later than December 31, 2019. Complete one Agreement per project.
- 2 A completed Appendix II Plan Review Checklist.
- 3 Title 24 Certificate of Compliance authored and signed by a 2016 Title 24 code Certified Energy Analyst (CEA). This report must be accompanied by the CAHP Incentive Report (CIR) generated from the same simulation.
 - Single-family and low-rise multi-family projects may require a copy of the final Title 24 CF-1R and IOU Estimated Incentive Calculation Worksheet for each plan type.
 - High-rise multi-family projects require a copy of the final Title 24 PERF-1 Form, MECH- 1, MECH-2, MECH-3, MECH-4, MECH-5 (if duct credit is claimed), ENV-1, ENV-2 and IOU Estimated Incentive Calculation Worksheet for each building type.
 - Multi-family buildings up to 25 units may utilize the unit-by-unit modeling approach. Buildings with more than 25 units must be modeled using the whole-building approach.
- 4 The electronic input file for correct version of the Title 24 energy compliance software for each model as constructed. This must be submitted by email to the CAHP representative. Accepted electronic files are .RIBD for CBECC-Res, .CIBD for CBECC-Com and .bld for EnergyPro.
- 5 A complete set of construction plans including:
 - Architectural plans including floor plans, elevations and sections.
 - Subdivision lot map with North arrow for production home projects or a site plan with North arrow for custom homes.
 - A site plan with North arrow for custom homes.
 - A copy of the tract map (tentative or recorded), construction schedule with phases, lots and addresses when available.
- 6 Applicant contracts with a 2016 Title 24 code Certified Energy Analyst (CEA) to prepare the Title 24 documentation and secure a Home Energy Rating System (HERS) rater.
- 7 The IOU may provide design assistance within reason for viable projects. The IOU will not provide funds for Title 24 documentation authors to reconstruct models or plans in the event of needed corrections.
- 8 For High-rise inspection protocol contact your IOU representative.
- 9 Upon completion of plan check, the project team will receive a letter of acceptance and Incentive Request Form(s) (IRF).



Read all CAHP instructions, requirements, and Terms and Conditions contained herein. For additional program information, speak with your IOU representative. The Applicant listed on the Agreement is responsible for submitting documentation that verifies compliance with CEC requirements to the IOU's satisfaction.

In cases where measures and construction elements may vary from default or minimum efficiency values, CAHP may require supporting specifications sheets. Sign the Agreement and submit the package to your IOU representative. Projects must be submitted as a complete package. Incomplete Agreement packages will be returned to the applicant.

Once you receive written approval from the IOU:

Construction and Inspection Phase

- 1 Ensure all applicable CF-2R forms are uploaded to the chosen HERS Registry for each lot.
- 2 If applicable, the appropriate CF-3R HERS rating certificates for each home upon completion of field verification need to be uploaded to the appropriate registry; certificates must be submitted for the tested lot according to CEC HERS sampling protocols.

- Be aware that the HERS rater will be inspecting to ensure that all required measures are implemented. Projects with "failures" are subject to CEC re-testing procedures and related fees at applicant's expense. If the measure fails the re-test, the applicant will need to submit an adjusted Agreement with the recalculated incentive amount or energy savings.
- 3 Before any inspections are uploaded to the HERS registry, notify your IOU of any changes that will affect total energy use of the home, such as added or relocated windows, addition of "bonus" rooms or other areas not shown on the Title 24 submittal, changes in proposed HVAC or water heating equipment and/or changes to building insulation. These changes will need to go through an adjustment Agreement. Changes made without notification may result in forfeiture of incentive payments.

Verification by IOU

Prior to paying incentives, the IOU will review all documents to ensure CAHP compliance. The IOU retains final authority to determine CAHP compliance and eligibility for incentives. Email all correspondence to your IOU representative.



Sign the Agreement and submit the package to your IOU representative.

Projects must be submitted as a complete package. Incomplete Agreement packages will be returned to the applicant.

4.3 General Building Requirements

To qualify for an incentive payment, each home covered by the Agreement must be:

- 1 A new construction project/home receiving electric distribution and/or natural gas distribution service from your local IOU. If the home only receives EITHER natural gas or electricity from the IOU you are applying to, it is only eligible for incentives related to that service. Seek the guidance of your IOU representative to ensure incentives are maximized for both natural gas and electricity. Homes served by propane will not receive an incentive for propane-related savings.
 - A single-family detached dwelling or two-dwelling building of any number of stories, R-3 occupancy, and on local IOU residential rates. Structures detached from the primary residence that are residential living areas (e.g., casitas) must also meet all CAHP criteria but are not eligible for a separate incentive.
 - A residential individually metered multi-family low-rise project. CAHP also accepts master metered multi-family affordable housing projects. Please seek your IOU representative's guidance.
 - Permitted under the 2016 Energy Efficiency Standards Residential Compliance Manual (Title 24) effective January 1, 2017 and achieving compliance using a CEC-approved computer method.
 - Projects must meet, at a minimum, CEC and CAHP installation and field verification requirements, as documented by a certified HERS Rater.

- A high-rise residential multi-family building, Occupancy Group R, division 1 with four or more habitable stories. Built to exceed the 2016 Energy Efficiency Standards Nonresidential Compliance Manual Title 24 standards for the applicable CEC-specified climate zone.
- Some modular manufactured housing may qualify when regulated by Title 24 standards (not HUD - U.S. Department of Housing and Urban Development). Please contact your IOU representative for verification.

- 2 The following facilities do not qualify for participation: remodels, additions, manufactured housing, residential care facilities, hotels, motels, dormitories and community facilities. The IOU's offer a broad portfolio of other programs that may provide support to these facilities. Whole-house retrofits may qualify, please contact your IOU representative.

The following defines the dwelling unit types that qualify for program participation.

Single-family Project Building Design Type

Detached: A single-story or multiple-story structure consisting of one unit not attached to another building (except a garage or casitas). This may be either a custom home or part of a larger project consisting of multiple units/lots.

Duplex: A structure consisting of two dwelling units. The duplex can be a single structure or part of a larger project consisting of multiple structures and units but must be modeled as two separate units.

Townhome: A single-family dwelling unit constructed in a group of three or more attached units in which each unit extends from the foundation to roof and with open space on at least 2 sides. Must be modeled as individual separate units.

Multi-family Project Building Design Type

Attached/Condominium: A single- or multiple-story structure consisting of three or more dwelling units. The dwelling units are owned by the occupants. Does not apply to townhomes (see above).

Apartment: A single- or multiple-story structure consisting of three or more dwelling units. The dwelling units are not owned by the occupants.

5. Financial Incentives

5.1 Incentive Eligibility (Single-family and Multi-family Low-rise)

For Single-family, and Multi-family Low-rise, the program will use Delta EDR and Kicker EDR points (as defined in sections 5.2 and 5.3 below) to determine program eligibility and base incentive level. The minimum performance requirement is a Delta EDR plus kickers of 2.

The minimum Delta EDR plus kickers requirement in SDG&E territory is 4.

- Delta EDR is the difference between the standard design EDR and the proposed design EDR.
- Incentive “Kickers” can be used to increase the CAHP EDR score.

The estimated incentives increase incrementally as the performance of the structure increases.

Incentives can be calculated using CEC-approved software. Incentives are specific to the plan and orientation of each lot.

(Multi-family High-rise)

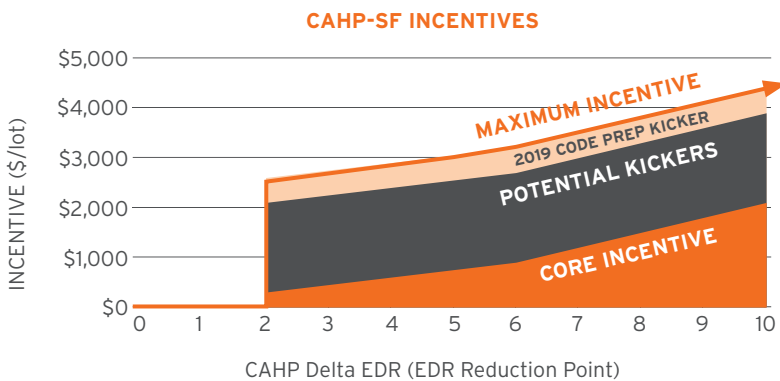
For Multi-family High-rise projects (four stories or more), the minimum baseline qualification is 10 percent above 2016 Title 24 building code, with increasing incentives for 15 percent, 20 percent and 30 percent above 2016 Title 24 building code. (See chart on next page for exact breakdown of baseline incentive structure.)

For multi-family high-rise projects the maximum incentive per project is \$250,000 (includes incentives and bonus kickers). The custom incentive for each building is calculated by the Title 24 energy modeling software and displayed in the CAHP Incentive Report (CIR). Incentives are specific to the orientation of each building and number of units for each multi-family building.



5.2 Energy Design Rating (EDR)

The EDR is a whole-house energy efficiency metric in which ratings closer to zero mean better performance. The CAHP single-family programs will use the Standard Design EDR minus the Proposed Design EDR plus Kicker points to determine the project's CAHP Delta EDR and program eligibility.

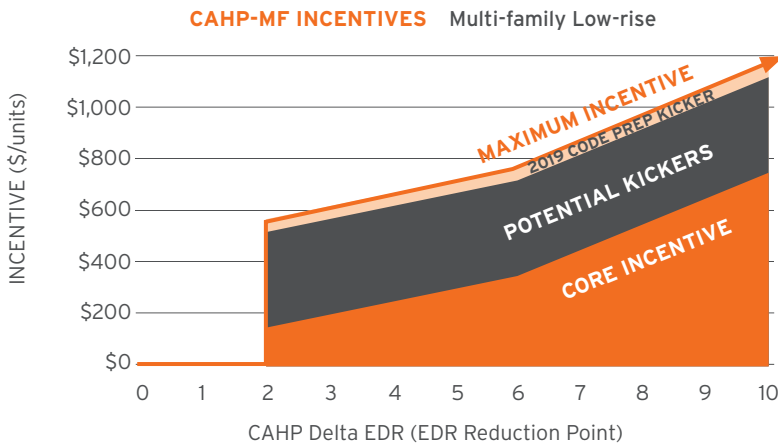


CAHP- Single-family

Base Incentive Structure:

\$300/unit for entry CAHP Delta EDR of 2.*
 \$150/unit for each point to 6
 \$300/unit for each point thereafter

* Entry Delta EDR in SDG&E territory is 4.
 \$150/unit for each Delta EDR point to 7.
 \$300/unit for each point thereafter.

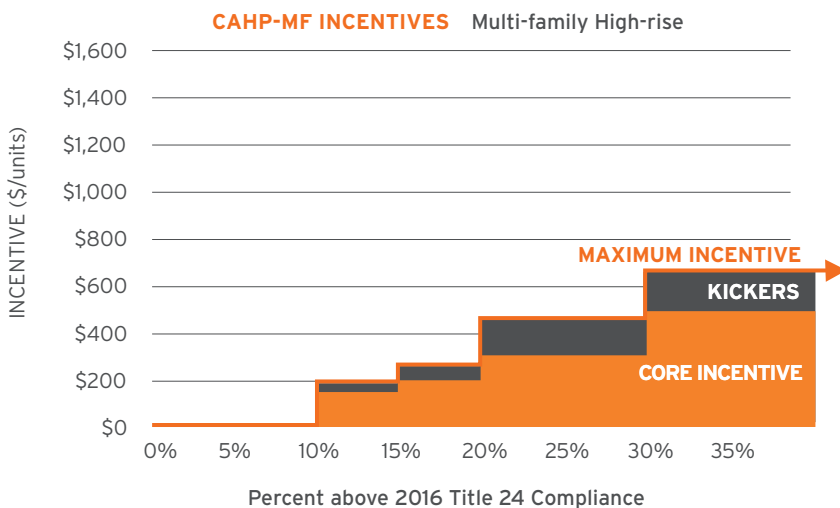


CAHP Multi-family Low-rise

Base Incentive Structure:

\$150/unit for entry CAHP Delta EDR of 2.*
 \$50/unit for each point to 6
 \$100/unit for each point thereafter

* Entry Delta EDR in SDG&E territory is 4.
 \$50/unit for each Delta EDR point to 7.
 \$100/unit for each point thereafter.



CAHP- Multi-family High-rise

Base Incentive Structure based on percentage above code compliance:

\$150/unit for 10% to <15%
 \$200/unit for 15 to <20%
 \$300/unit for 20 to <30%
 \$500/unit for 30% or greater
 Same bonus measures as LRMF
 Maximum incentive of \$250,000 (including bonus measures)

5.3. Additional Financial Incentives

The 2018-2019 CAHP offers additional incentives to projects that include one or more of the below project elements.

NOTE: Multiple kickers can be claimed on a project.

EDR Performance Embedded Kickers-

CLIMATE ZONE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
COASTAL (C) OR INLAND (I)	I	I	C	C	C	C	C	C	I	I	I	I	I	I	I	C

100% LED Lighting (EDR point- 0.5 inland, 1.0 coastal)-

- All hard wired lighting needs to be LED and meet the requirements of JA8-2016.

Home Energy Management System (HEMS) (EDR point- 0.5 inland, 1.0 coastal) (HEMS is SF only)

- Must provide a method for the user to access energy use information/ history via a user interface.
- Alternate compliance path: wire home so that no plug load, lighting load, or appliances share a common circuit.

All ENERGY STAR® Tier II Appliances (MFLR only) (EDR point- 0.5 inland, 1.0 coastal)

Cash bonus kickers

Balanced IAQ (\$100SF, \$25 MF)

The home is installing a balanced IAQ ventilation system. Meets ASHRAE standard 62.2*

DOE Zero-Energy Ready (\$400 SF, \$25 MFLR only)

The home is participating in the Department of Energy Net-Zero Energy ready program. www.energy.gov/eere/buildings/zero-energy-ready-home*

* These two kickers cannot be taken together.

ENERGY STAR® Laundry Facility (\$5 per machine)

Drain Water Heat Recovery (\$200 per device MF)

Hybrid Kickers (Modeled Savings + Cash Bonus) Per unit:

High-performance Fenestration (\$200 SF, \$75 MF)

The home is being constructed with all triple-pane windows

High-performance Attics (\$200 SF only) The home is being constructed with a high-performance attics in compliance with the prescriptive requirements as defined in the 2016 Residential Compliance Manual (Title 24, Part 6)

High-performance Walls (\$200 SF, \$25 MF) The home is being constructed with a high performance walls in compliance with the prescriptive requirements as defined in the 2016 Residential Compliance Manual (Title 24, Part 6)

Whole-house Fans (\$100 SF only) The home is being constructed with a whole-house fan in compliance with the prescriptive requirements as defined in the 2016 Residential Compliance Manual (Title 24, Part 6)

Quality Insulation Installation (\$400 SF, \$45 MFLR only): Insulation installation should be as per methods detailed in the Residential Appendix RA3.5 and must be inspected by a HERS rater per methods detailed in the Residential Appendix RA3.5. When compliance credit is taken for QII, a third-party HERS Rater is required to verify the integrity of the installed insulation. The installer shall provide evidence with compliance documentation that all insulation specified is installed to meet specified R-values and assembly U-factors.

Reduced Building Air Leakage (\$100-\$300 SF only):

An energy credit is allowed through the performance approach when the rate of envelope air leakage of the building is less than the air leakage rate assumed for the standard design building (5 ACH50). A third-party HERS Rater shall verify the air leakage rate as per the Residential Appendix RA3.8. The incentive is tiered for reduced air leakage, starting at \$100 for ≤4 ACH50, \$150 for ≤3 ACH50, \$200 for ≤2 ACH50 and \$300 for ≤1 ACH50.

2019 Code Prep Kickers:

2019 Code Ready (\$250 SF, \$25 MFLR only)

The home meets the CAHP EDR necessary for program entry. Solar is not being installed but is designed with a solar-ready zone, and a 3kW panel (when modeled) would lead to a final proposed EDR of zero.

2019 Code Home (\$500 SF, \$50 MFLR only)

The home meets the CAHP EDR necessary for program entry. When the proposed solar (to be installed) is modeled the final proposed EDR reaches zero.

Kicker Summary

	Kicker	SF Value per lot	MF Value per unit
Point Kickers	100% LED Lighting	0.5 Inland 1.0 Coastal	0.5 Inland 1.0 Coastal
	Home Energy Management System (HEMS)	0.5 Inland 1.0 Coastal	Not available
	All ENERGY STAR® Tier II Appliances	Not available	0.5 Inland 1.0 Coastal
Cash Bonus Kickers	High-performance Fenestration	\$200	\$75
	High-performance Attics	\$200	Not available
	High-performance Walls	\$200	\$25
	Whole-house Fans	\$100	Not available
	Balanced IAQ	\$100	\$25
	2019 Code Ready	\$250	\$25 (MFLR only)
	DOE Zero Energy Ready Home	\$400	\$25 (MFLR only)
	2019 Code Home	\$500	\$50 (MFLR only)
	ENERGY STAR® Laundry Facility	Not available	\$5 per machine
	Drain Water Heat Recovery	Not available	\$200 per device
	Quality Insulation Installation (QII)	\$400	\$45 (MFLR only)
	Reduced Building Air Leakage (≤1 ACH50)	\$300	Not available
	Reduced Building Air Leakage (≤2 ACH50)	\$200	Not available
	Reduced Building Air Leakage (≤3 ACH50)	\$150	Not available
	Reduced Building Air Leakage (≤4 ACH50)	\$100	Not available

California ENERGY STAR® New Homes Program—Marketing Support Bonus

**Available in SoCalGas territory only*

Projects that comply with ENERGY STAR® standards will be offered free ENERGY STAR marketing materials. IOUs will provide a materials catalog including banners, brochures, stickers and more. Each project will be given a budget of \$10 per multi-family unit and \$40 per single-family unit. Please contact your local assigned representative for details. ENERGY STAR is a national, voluntary program sponsored and developed by the United States Environmental Protection Agency (EPA) that promotes energy-efficient products, including homes. Homes that have earned the ENERGY STAR label meet the EPA's performance guidelines for energy efficiency following third-party verification from an accredited organization. Further information can be reviewed at the EPA ENERGY STAR Internet site, www.energystar.gov.

Thermostatic Shower Restriction Valve—\$7/unit or \$15/set When Combined with Low-flow Showerhead

**Available in SoCalGas territory only*

Projects that install thermostatic shower restriction valves in SoCalGas service territories are eligible for this incentive. This measure is not allowed when combined with tankless water heaters or recirculation pumps. The incentive increases to \$15 per unit when combined with a low-flow showerhead. To qualify, the low-flow showerhead must pass test procedure ANSI/ASME standard A112.18.1-2000, Section 5.5, and have a flow rate equal to or less than 1.6 gallons per minute. This measure is not available on the Utility Estimated Incentive Calculation Worksheet. Please fill out "Low-flow showerhead/Thermostatic Shower Restriction Valve Installation Details" form to apply for this kicker. Project must meet core incentive CAHP requirements to be eligible for this incentive.

6. Terms and Conditions

I, the Applicant, agree to the following terms and conditions ("the Agreement"):

- 1 Applicant meets the CAHP eligibility requirements as stated in the appropriate attachment(s) included with the Agreement.
- 2 The information Applicant has supplied on the Agreement and attachment(s) is true, correct and complete.
- 3 Applicant has read and understand the terms and conditions of the Agreement and on the appropriate attachments and agree to abide by the rules, requirements and terms set forth on the Agreement and all attachments.

- 4 If the Agreement is terminated for any reason, IOU shall not be liable to the Applicant for damages or compensation of any kind.
- 5 IOU reserves the right to determine eligibility for the Incentive.
- 6 IOU makes no representation or warranty, and assumes no liability with respect to quality, safety, performance, or other aspect of any design, system or appliance installed pursuant to the Agreement, and expressly disclaims any such representation, warranty or liability. Applicant agrees to indemnify IOU, its affiliates, subsidiaries, parent company, officers, directors, agents and employees against all loss, damage, expense, fees, costs and liability arising from any measures installed.
- 7 Both funding and the conditions of the incentive are subject to the jurisdiction of the California Public Utilities Commission (CPUC) and shall be subject to such changes or modifications as the CPUC may, from time to time, direct in the exercise of its jurisdiction. **If there are changes in the estimated incentive, IOU will endeavor, but cannot guarantee, to provide a reasonable period of time before changes go into effect.**
- 8 Applicant understands that if the incentive is modified in any way or terminated by order of any government entity, then the Agreement shall be revised or terminated consistent with that order.
- 9 IOU may assign the Agreement, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise, without the Applicant's prior written consent, provided IOU remains obligated for payments incurred prior to the assignment. The Applicant may not assign this Agreement, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of IOU.
- 10 Applicant understands the incentive requires inspections and measurements of the performance of the measures. Therefore, the Applicant agrees to provide access to the project site for these purposes to IOU and/ or its agents or assigns and the CPUC and/or its agents or assigns.
- 11 Applicant agrees to release IOU, its affiliates, parent company, officers, managers, directors, agents and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any:
 - (1) injury to or death of persons, including but



- not limited to employees of IOU, customer, or any third party; (2) injury to property or other interests of IOU, Applicant or any third party; (3) violation of local, state, or federal common law, statute, or regulation, including but not limited to environmental laws or regulations; (4) energy savings shortfall; so long as such injury, violation, or shortfall (as set forth in (1)–(4) above) arises from or is in any way connected with the Project, including any third party's performance of or failure to perform the Project, however caused, regardless of any strict liability or negligence of IOU, its officers, managers or employees.
- 12 Energy savings for which incentives are paid cannot exceed the actual usage provided by IOU. Projects submitted must have positive kW, kWh, and Therm savings. Nonutility supply, such as cogeneration or deliveries from another commodity supplier, does not qualify as usage from IOU (with the exception of direct-access customers or customers paying departing load fees for which the IOU collects PPP or PGC charges).
- 13 Funding approved for this incentive is limited and will be paid on a first-come, first-served basis to qualified applicants. Funds will only be reserved upon IOU's execution of the Agreement. This incentive offer is subject to the availability of authorized funds.

- 14 Installation of any energy-efficient equipment required for compliance with 2016 Title 24 will not qualify for incentives. Energy efficiency improvements beyond 2016 Title 24 requirements or a generally accepted industry standard, where applicable, may be eligible for incentives.
- 15 Specific restrictions may apply to each energy-efficiency system, as outlined in the instructions and attached project forms.
- 16 To be eligible for incentives, Applicant agrees that Applicant will not apply for or receive incentives offered by local or state entities or other utilities for measures and associated fuel savings covered under this Agreement.
- 17 IOU may suspend or terminate the Agreement, without cause, upon written notice to Applicant.
- 18 Applicant understands the following tax liability provisions: IOU will report incentives greater than \$600 as income to me on IRS form 1099 unless: 1) Applicant has marked the "Corporation" or "Exempt" tax status box, or 2) the Payment Release Authorization Form has been completed, in which the designated party will be responsible for tax liability. IOU recommends that Applicant consults a tax adviser concerning the taxability of incentives. IOU is not responsible for any taxes that may be imposed due to incentive payments.
- 19 Applicant understands once an acknowledgement receipt is issued for this Agreement under a Customized Energy Efficiency Program, the Agreement will be processed under that program. If the Agreement is withdrawn at any time in the process, Applicant may only resubmit an Agreement for the same project in the same program, under specific circumstances approved by the assigned IOU representative.
- 20 Applicant understands the IOU may use the services of external consultant(s) for plan review and/ or other functions related to the submitted projects. The Applicant hereby authorizes the IOU to share any of the submitted project information with the consultants, expressly for this purpose.
- 21 Applicant understands that program timing, rules and requirements may be modified by each IOU in their territory, or by the program as a whole, at any time.
- 22 To afford an even distribution of funds for projects under this program, owners, builders and developers may be required to demonstrate the viability of the project for which they are applying. Following the approval of the Agreement and within a three (3) month period, the applicant may be asked to supply documents that reflect a commitment to timely construction. The following documents may be required:

- Grading permit
- Building permit
- Approved construction schedule from the governing entity
- Financing and other pertinent documents

If, after review of these documents, the IOU determines that the project is not progressing, the Agreement may be cancelled. If these documents are not available, the applicant must demonstrate that the project is in the process of obtaining construction permits. If this Agreement is cancelled, the applicant may reapply at a later date. Agreements will be accepted and estimated incentives will be committed based upon the funds available at the time of reapplication.

7. New Solar Homes Partnership

The New Solar Homes Partnership (NSHP) is part of the comprehensive statewide solar program, known as the California Solar Initiative.

For additional information, please go to www.gosolarcalifornia.ca.gov.

8. For More Information

Further information regarding the CAHP and participation can be obtained from an IOU representative. The representative can work with the design team to determine which program path is best suited to the project and how to optimize its energy efficiency. Additionally, the IOU offers design assistance for project review and training classes.

Contact Information

SoCalGas

Phone: 866-563-2637

Email: NewHomes@socalgas.com

Web: socalgas.com/cahp

San Diego Gas & Electric Company

Phone: 619-378-0384

Email: STate@sdge.com

Southern California Edison

Phone: 626-622-9182

Email: Monica.Leong@sce.com

9. Calculation Instructions

EXAMPLE

(Does not apply to projects in SDG&E territory where a CAHP EDR score of 4 is required.)

Use the following tables to determine incentives per lot.

The SF example assumes a CAHP delta EDR of 5 and cash bonus kickers of \$850; enter the amount of \$750 in the incentives per lot column, \$850 in the Cash bonus kickers column, and \$1,600 in the Total incentive per lot column.

Plan Name	Ori-entation	Square Footage	Occu-pancy	Standard Design EDR	Proposed Design EDR	Delta EDR	EDR Kicker Points	CAHP Delta EDR	Incentives Per Lot*	Cash Bonus Kickers	Total incentive per lot	Est. # Units in Plan	=	Est. Incentive
ABC	N	2300	SF	50	47	3	2	5	\$750	\$850	\$1,600	x 8	=	\$12,800
XYZ	E	1800	MFLR	55	53	2	1	3	\$200	\$100	\$300	x 12	=	\$3,600
MNO	S	1300	MFHR						\$300	\$0	\$300	X 50	=	\$15,000

CAHP Delta EDR	=	SF Base Incentive per unit	MFLR Base Incentive per unit
1	=	\$0	\$0
2	=	\$300	\$150
3	=	\$450	\$200
4	=	\$600	\$250
5	=	\$750	\$300
6	=	\$900	\$350
7	=	\$1,200	\$450
8	=	\$1,500	\$550
9	=	\$1,800	\$650
10	=	\$2,100	\$750
11	=	\$2,400	\$850
12	=	\$2,700	\$950
13	=	\$3,000	\$1,050
14	=	\$3,300	\$1,150
15	=	\$3,600	\$1,250
16	=	\$3,900	\$1,350

Percent Above Code	=	MFHR Base Incentive per unit
10–14.9	=	\$150
15–19.9	=	\$200
20–29.9	=	\$300
30+	=	\$500



Project Number (Internal Use Only) _____

2018-2019 California Advanced Homes Program Single-Family/Multi-Family Incentive Agreement

Minimum energy use requirements for participation in the California Advanced New Homes Program: For single-family and multi-family low-rise, the minimum performance requirement is a CAHP Delta EDR Score of 2, or a CAHP EDR Score of 4 in SDG&E territory. For Multi-family High-rise, the minimum performance requirement is 10% above code compliance. Please refer to the Handbook Section 8 for more information).

APPLICANT/PAYEE INFORMATION

Applicant/Builder Name		
IOU Representative	Payee Name	
Federal Tax ID # (or) Social Security #	<input type="checkbox"/> Corporation <input type="checkbox"/> Non Corp <input type="checkbox"/> Individual <input type="checkbox"/> Exempt If exempt, describe why:	
Payee Address	Payee City	Payee ZIP

PROJECT INFORMATION

Project Name	Climate Zone	
Project Address/Location	Project City	Project ZIP
Project Contact	Contact Telephone Number	
Fax Number	Email	
Permitting Agency	Permit Date	
Start Date	Estimated Completion Date	
HERS Provider (i.e. HERS Registry)	HERS Company	
HERS Email	HERS Address	
HERS Rater	HERS Rater Telephone Number	

PROJECT TYPE

Please Select Single-family or Multi-family:	<input type="checkbox"/> Single-family - Please select housing type:	<input type="checkbox"/> Multi-family - Please select housing type:
	Are you participating in the New Solar Homes Partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
What company is providing electricity to the project? <input type="checkbox"/> Southern California Edison <input type="checkbox"/> SDG&E® <input type="checkbox"/> Other:		
What company is providing natural gas to the project? <input type="checkbox"/> SoCalGas <input type="checkbox"/> SDG&E <input type="checkbox"/> Other:		
Is a company providing propane to the project? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list company:		
Tract Number	Total # of Plan Types in Project	
Phase Number(s)	Lot Number(s)	
# of Units to Complete in: 2018 _____ 2019 _____ 2020 _____ 2021 _____ Total _____		

GENERAL INSTRUCTIONS AND REQUIREMENTS

- 1 Call your local IOU representative for details and funding availability on the California Advanced Homes Program (CAHP) prior to submitting this Agreement. Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the Program requirements. No payments will be made for any energy-efficient upgrades installed without prior written approval from your local IOU.
- 2 Review the CAHP Participant Handbook and Terms & Conditions.
- 3 Complete one form per project and list ALL plans/building types. Incentive payments are available only to owners, builders or developers named on the CAHP Incentive Agreement unless your IOU allows the submission of a Payment Release Form. Please ask your IOU for details.
- 4 No projects will be accepted after drywall has been installed in enrolled units.

IOU INCENTIVE CALCULATION WORKSHEET (Please attach supplement for additional plans):
Based on Final CF-1R and/or PERF-1 Form as filed for your building permit
 (Measures/Incentives will be verified by field inspection)

Plan Name	Orientation	Sq. Ftge.	Occupancy	Std. Design EDR	Prpsd. Design EDR	Delta EDR	EDR Kicker Pts.	CAHP Delta EDR	Incentive per Lot/Unit	Cash Bonus Kickers	Total Incentive per Lot/Unit	Est. # Lots/Units in Plan	Est. Incentive	
* Please see Section 9 for incentives per lot calculation instructions														
												X	=	
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												X	=	
Subtotal for Core + Kickers												=		
# of shower restriction valves, normal flow						# of shower restriction valves, low-flow								
Incentive amount may vary according to final inspection results. Final incentive amount per project may not exceed \$250,000 for multifamily projects.												Total Incentive	=	
Energy Star Marketing Support Bonus	Total SF Units	(at \$40 per unit); Total MF Units						(at \$10 per unit)						=

IOU USE ONLY

Date Agreement Received	Date Agreement Approved
Date of First Contact	Authorized Signature
Title	Date
Resubmittal Adjustment	IOU Manager Approver
Plan Check Approval	

AGREEMENT

I, the undersigned, agree that:

- 1 I have read and understand and agree to abide to the 2018-2019 California Advanced Homes Program rules, requirements and terms and conditions set forth in this Agreement and in the Handbook.
- 2 The information that I have supplied on this Agreement is true, correct and complete.
- 3 This project is not receiving duplicate funding from multiple IOU sponsored energy efficiency programs for the same measures and associated fuels.
- 4 I agree to permit the IOU to discuss all aspects of this project with my energy consultant and/or HERS rater.
- 5 I understand that this Agreement is valid for 36 months from date of IOU acceptance.

Company Name _____

Applicant Name (Print) _____ Title _____

Signature _____ Date Signed _____



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**Please provide the following documentation for participation in the
California Advanced Homes Program and/or New Solar Homes Partnership**

The purpose of this checklist is to expedite the required plan check process. Agreements submitted without the following documents will be returned to Applicant.

Are you participating in the New Solar Homes Partnership? Yes No

A complete set of construction plans which contain the following:

- Architectural drawings (electrical, mechanical, and plumbing may also be required). When submitting electronic plans a CD is preferred.
- A window and door schedule that shows sizes and includes ALL skylights.
- Elevation, wall, roof, floor construction assemblies.
- Floor finish schedule (a.k.a. floor covering schedule) if CF-1R shows high-mass design.
- A list of lots, addresses, and their respective plan numbers. Not available for custom homes.
- For custom homes, a site plan with North arrow. For subdivisions, a subdivision map with North arrow.
- Plans may be submitted electronically either as a PDF file or using a file extension of .dwf
PLAN SIZE MUST BE FULL OR HALF-SIZE.

Title 24 forms and files:

- Certificate of Compliance Form (CF-1R for low-rise residential or a PERF-1 for high-rise residential) and the CAHP Incentive Report (CIR) signed by a 2016 Title 24 code Certified Energy Analyst (CEA)
- The electronic input files that generated the signed 2016 Title 24 code Certificate of Compliance Form (preferably via e-mail). This file will have file extension ".bld" for EnergyPro or .RIBD for CBECC-Res, .CIBD for CBECC-Com. Please note – only plans on the Agreement should be submitted and uploaded.

Equipment and materials documentation (if required by IOU):

- Windows, glazed doors, skylights—specification sheet with manufacturer's name that demonstrates NFRC rated U-factor and Solar Heat Gain Coefficient (SHGC)
- Space heating equipment—specification sheet with manufacturer's name/model number and efficiency rating for each unit
- Air conditioner—specification sheet with manufacturer's name/model numbers for condenser/coil match or AHRI reference number for each proposed unit (www.ahridirectory.org) that has an efficiency rating GREATER than SEER 13, EER 11
- Water heater—specification sheet with manufacturer's name/model number and efficiency rating. If installing a Solar Water Heater, a CF-SR is required.
- Specification sheets for any special features as included in your Title 24 calculations report



Let Us Help Turn Your Blueprints Into Greenprints.

Development of sustainable and livable communities combines environmental protection, green building design, energy efficiency and land-use planning integrated with the building design process. These innovative building practices also help you meet your bottom line.

Why It Pays To Exceed Building Standards

Designing energy efficiency into the homes you build helps reduce greenhouse gas emissions, differentiates your community, increases the comfort and indoor air quality of your homes and helps decrease your buyers' monthly utility bills.

Let Us Help You.

Energy-efficient appliances, equipment and building materials help homeowners save on utility bills while enjoying a comfortable and healthier, energy-efficient home.



The California Advanced Homes Program is funded by California investor-owned utility customers and administered by Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison® under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase, and ownership of goods and/or services are the sole responsibility of customer. The investor-owned utilities make no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. The investor-owned utilities do not endorse, qualify, or guarantee the work of any third party. Eligibility requirements apply; see the program conditions for details.

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