



The Commercial and Residential Buildings for New Construction Subprogram

Application and Agreement Form

Subprogram Overview

The Commercial and Residential Buildings for New Construction (CARB) subprogram provides rebates to residential and non-residential customers for the permanent installation of qualified high-efficiency equipment. New eligible construction projects may be eligible if built to meet or exceed the State of California Title 24 Energy Efficiency Standards, equipped with qualifying natural gas measures, and built in the SoCalGas service territory.

Subprogram Requirements

Program funds are limited and will be reserved on a first-come, first-served basis. The CARB subprogram may be changed or terminated without prior notice at any time. Applicants may not accept incentives and/or rebates from more than one utility-sponsored energy efficiency program for the same equipment.

Eligibility For Participation

Customer eligibility for the CARB subprogram is open to all mixed-use new construction customers who will (1) receive natural gas from SoCalGas, and (2) pay the Public Purpose Program (PPP) surcharge on the gas meter on which the energy-efficient equipment is installed.

For the project to be eligible for the CARB subprogram it must meet the following requirements:

- Applications and Agreement Forms must be submitted to and approved by SoCalGas prior to the purchase of equipment applicable to the rebate to ensure funds will be reserved.

- Applications and Agreement Forms are eligible for non-residential equipment or a mix of non-residential and residential equipment. Projects with solely residential equipment are not eligible for this subprogram.

Equipment Requirements

Equipment must meet all applicable requirements as further described in the Application and Agreement Form. Additionally, SoCalGas reserves the right to verify installation and deny payment for equipment that does not meet all subprogram, eligibility and equipment requirements. Only new and unused equipment may be eligible. Equipment must also be installed and operational according to applicable federal, state, and local building codes, ordinances, standards and/or manufacturer's requirements.

The CARB subprogram accepts a wide variety of energy-saving projects. All qualifying energy efficiency equipment must meet the following criteria:

- 1. Must be purchased prior to installation**
Providing proof of purchase where equipment is paid in full.
- 2. Must be permanently installed**
Equipment that is not permanently installed, or can be easily removed, in each case, as determined by SoCalGas, is ineligible for rebate.
- 3. Cannot overlap with other incentive programs**
Customer may not apply to more than one California energy efficiency incentive or rebate program for the same equipment/measure or receive incentives from more than one such program for any equipment/measure. Gas and Electric components of a measure will be considered separately.



Reserving Funds

To reserve funds:

1. Complete the Application and Agreement Form (including the attached worksheet) for commercial and residential mixed-use new construction and major modernization.
2. Print out, sign, and date the Application and Agreement Form (including the worksheets).
3. Provide a copy of the project's Title 24 Certificate(s) of Compliance CF-1R(s), authored and signed by a Certified Energy Analyst (CEA)(applicable to multi-family customers only).
4. Provide a copy of the W-9 Form for Applicant or the third-party payee receiving the rebate check.
5. Prior to the construction start date, email the completed Application, worksheets, and CF-1R Certificate to CARB@socalgas.com.
6. Builders currently participating in the CARB Subprogram should reach out to SoCalGas Account Executive to enroll in additional projects.
7. If the Application is approved by SoCalGas, an email with a reservation number will be sent to the applicant as proof of project approval to participate in the CARB Subprogram. Funds will be reserved for 36 months from the date of the approval email. The deadline may be extended on a case-by-case basis, pending the availability of funds at SoCalGas' discretion. Only written requests sent by the applicant to the previously stated postal address or email address will be considered.

Project Install

After the Applicant has received written approval, the Applicant may initiate installation, which includes ordering equipment, purchasing equipment, demolition, installation, and commissioning. After all project equipment/measures have been installed and commissioned and are considered fully operational, the Applicant must notify SoCalGas.

Installation Review

Upon receipt of the Installation Equipment Information sheet, SoCalGas will evaluate the submitted package and if necessary, conduct a post-installation inspection to verify project installation and ensure the scope of work was not altered from the approved project Application and Agreement Form. Changes to the project scope of work will not be eligible for rebate without receiving written consent from SoCalGas prior to the completion of work.

Request For Payment

To claim your rebate:

1. When the project has been completed, complete the Request for Payment (RFP) form and send to SoCalGas with the following supporting documentation. For Applications with multiple projects, a completed RFP form can be sent in for each completed phase:
 - Project site address list (if more than one address in the project)
 - Proof of purchase - A signed Attestation of Equipment Installation will be required to be submitted with each Request for Payment Form.
 - Proof of LEED or WaterSense certification – A copy of the notification of certification or other record that documents the certification (applicable to multi-family customers only).
2. Email the completed Application and Agreement Form, along with the other required documentation with proof of purchase(s) to CARB@socalgas.com.

Rebate Payment

A rebate check for the qualified product(s) is generally mailed 90 days after SoCalGas approves a correct and completed Application and Agreement Form.

For any questions, please call 1-800-508-2348 or email: CARB@socalgas.com

Terms & Conditions

The following terms and conditions apply to the CARB subprogram. The individual or entity submitting the Application ("Applicant") hereby acknowledges and agrees as follows:

1. Applicant has read and understands the rules, requirements, and terms and conditions set forth in this Application and Agreement Form (together with all attachments hereto and the requirements and instructions set forth above, "Application") and agrees to abide by such rules, requirements and terms and conditions.
2. Applicant meets all eligibility requirements as stated or referenced in the Application.
3. The information Applicant has supplied on the Application and attachment(s) is true, correct and complete.
4. If the Application or any work related thereto is terminated for any reason, SoCalGas shall not be liable to the Applicant for damages or compensation of any kind. Notwithstanding anything to the contrary set forth herein, none of SoCalGas its affiliates, subsidiaries, parent companies, and its and their respective officers, directors, agents, and employees shall be liable to Applicant for any consequential damages, including loss of investment opportunity or lost profits, business interruption, or inability to obtain other contracts, whether such liability arises in contract, tort (including negligence or strict liability), or otherwise.
5. SoCalGas reserves the right, in its sole discretion, to determine eligibility for rebates. SoCalGas' determination is final.
6. SoCalGas makes no representation or warranty (including the warranty of merchantability or fitness for a particular purpose), and assumes no liability with respect to quality, safety, performance, or other aspect of any design, system or equipment selected or installed and expressly disclaims any such representation, warranty or liability. To the fullest extent permitted by law, Applicant agrees to indemnify and hold harmless SoCalGas, 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 CARB Subprogram 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.
8. Applicant understands that if the rebate is modified in any way or terminated by order of any government entity, then the Application shall be revised or terminated consistent with that order.
9. SoCalGas may assign the Application, 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. The Applicant may not assign this Application, in whole or in part (including by a direct or indirect change of control or by operation of law), or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of SoCalGas.
10. Applicant understands rebates require inspections of the installed equipment. Therefore, Applicant agrees to provide access to the project site for these purposes to SoCalGas and/ or its agents or assigns and the CPUC and/or its agents or assigns.
11. To the fullest extent permitted by law, Applicant agrees to indemnify and hold harmless SoCalGas, 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 SoCalGas, Applicant, or any third party; (2) injury to property or other interests of SoCalGas, 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; and/or (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.
12. Funding approved for this rebate is limited and will be paid on a first-come, first-served basis to qualified Applicants. Funds will only be reserved upon SoCalGas' approval of the Application. This rebate offer is subject to the availability of authorized funds.
13. Applicant agrees that Applicant will not apply for or receive incentives or rebates offered by local or state entities or other utilities for eligible equipment covered under this Application.
14. Applicant understands the following tax liability provisions: SoCalGas may report rebates greater than \$600 as income to Applicant on IRS Form 1099 unless: 1) Applicant has marked the "Corporation" or "Exempt" tax status box on the Request for Payment Form, or 2) Applicant has authorized SoCalGas to remit the rebate payment to a third party on the RFP Form. SoCalGas will report rebates greater than \$600 as income to the third party payee unless the Applicant has marked the "Corporation" or "Exempt" tax status box for the payee on the RFP Form. Utility recommends that Applicant consults a tax adviser concerning the taxability of rebates. SoCalGas is not responsible for any taxes that may be imposed due to rebate payments.
15. Applicant understands once an Approval Letter is issued for this Application, the Application will be processed under the program and the appliance rebate in place at the time. If the Application is withdrawn at any time in the process, Applicant may only resubmit an Application for the same project in the same program and appliance rebate, under specific approved circumstances.

16. Applicant understands SoCalGas may use the services of external consultant(s) for functions related to the submitted projects. The Applicant hereby authorizes SoCalGas to share any of the submitted project information with the consultants, expressly for this purpose.
17. If this Agreement is canceled for any reason, the Applicant may reapply at a later date. Applications will be accepted and estimated rebates will be committed based upon the funds available and program terms at the time of reapplication.
18. SoCalGas may suspend or terminate the Application, with or without cause.

The following terms and conditions apply to the Multi-Family customers within the CARB subprogram. The individual or entity submitting the Application ("Applicant") hereby acknowledges and agrees as follows:

1. By submitting the CF-1R(s) Applicant acknowledges that the project has complied with all applicable requirements of California Title 24 Building Standards prior to applying for the program.
2. Applicant acknowledges and agrees that rebates are only available for qualifying equipment that meet or exceed California Title 20 Appliance Efficiency Regulations. Additionally, for space-heating and water-heating equipment, only models with efficiency levels which exceed that stated on the submitted CF-1R will be eligible for a rebate.
3. SoCalGas may assign the Application, 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. The Applicant may not assign this Application, in whole or in part (including by a direct or in direct change of control or by operation of law), or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of SoCalGas.

The Commercial and Residential Buildings for New Construction is a subprogram of the Energy Efficiency Rebates for Business Program which is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) 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 the customer. Customers who choose to participate in this program are not obligated to purchase any additional goods or services offered by manufacturer, vendor, service provider, or any other third party. **SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of selected goods and/or services selected by customer. SoCalGas does not endorse, qualify, or guarantee the work of any third party.** Eligibility requirements apply; see the program conditions for details.

Application & Agreement Form

Complete this Application and Agreement Form to reserve funds for non-residential and residential new eligible construction projects.

Applicant/Payee Information

Applicant/Builder Name		
Utility Representative	Payee Name	
Federal Tax ID (or) Social Security	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Individual <input type="checkbox"/> Partnership If exempt, describe why:	
Payee Address	Payee City	Payee ZIP Code

Project Information

Project Name		
Project Address/Location	Project City	Payee ZIP Code
Authorized Project Contact	Authorized Contact Telephone Number	
Email		
Permitting Agency	Permit Date	
Start Date	Estimated Completion Date	
HERS' Provider (i.e. HERS Registry)	HERS' Company	
HERS' Rater Address	HERS' Rater Email	
HERS' Rater Telephone No.		

*HERS = Home Energy Rating System

Project Type (Please Select Multi-family or Commercial)

<input type="checkbox"/> Multi-family - Please select housing type: <input type="checkbox"/> Low-rise (Less than 4 stories) <input type="checkbox"/> High-rise (4 stories or more)	<input type="checkbox"/> Commercial
What utility company is providing electricity to the project? <input type="checkbox"/> Southern California Edison <input type="checkbox"/> LADWP <input type="checkbox"/> PG&E <input type="checkbox"/> SDG&E <input type="checkbox"/> Other	
This project will be served by SoCalGas: <input type="checkbox"/> Yes <input type="checkbox"/> No Projects not served by SoCalGas are not eligible.	
Tract Number	
Phase Number(s)	Lot Number(s)
Number of Units to Complete in: 2020 _____ 2021 _____ 2022 _____ 2023 _____ 2024 _____ 2025 _____ Total _____	

Applicant Agreement

I, the undersigned, agree that:

1. I have read and understand and agree to abide to the CARB subprogram rules, requirements and terms and conditions set forth or referenced in this Application.
2. The information that I have supplied on this Application is true, correct and complete.
3. This project is not receiving duplicate funding from multiple utility-sponsored energy efficiency programs for the same measures.
4. I understand that this Agreement is valid for 36 months from date of utility acceptance.

Company Name

Name of Authorized Representative

Title

Contractor Signature

Date

Commercial Worksheet

Commercial Baseline Level (Must install one from each group)

Group 1 — Water Heating

Commercial Hot Water Boilers

System Type	Efficiency Requirement	Rebate Amount *	kBTUs per Unit *	Quantity =	Total Rebate Amount
Small/Medium - Tier I <200 kBtuh	≥ 0.87 UEF	\$5/kBtuh			\$
Small/Medium - Tier II <200 kBtuh	≥ 0.92 UEF	\$5.50/kBtuh			\$
Small/Medium - Tier III <200 kBtuh	≥ 0.96 UEF	\$6/kBtuh			\$
Large - Tier I ≥300 kBtuh	≥ 0.90 TE or ≥0.92 CE	\$5/kBtuh			\$
Large - Tier II ≥300 kBtuh	≥0.96 TE or ≥0.98 CE	\$9/kBtuh			\$

Tankless Water Heater

Water Heater	Water Heater Rating	Required Efficiency	Rebate Amount
Small - Tier 1	<200 kBtuh	≥ 0.81 UEF	\$0.45/kBtuh
Small - Tier 2	<200 kBtuh	≥ 0.87 UEF	\$5/kBtuh
Small - Tier 3	<200 kBtuh	≥ 0.92 UEF	\$6/kBtuh
Small - Tier 4	<200 kBtuh	≥ 0.96 UEF	\$7/kBtuh
Medium - Tier 1	<200 kBtuh	≥ 0.84 TE	\$1/kBtuh
Medium - Tier 2	<200 kBtuh	≥ 0.90 TE	\$7/kBtuh
Medium - Tier 3	<200 kBtuh	≥ 0.96 TE	\$6/kBtuh
Large - Tier 1	≥ 200 kBtuh	≥ 0.84 TE	\$3/kBtuh
Large - Tier 2	≥ 200 kBtuh	≥ 0.90 TE	\$12/kBtuh

New Measures



Equipment	Required Efficiency	Size	Rebate Amount
Commercial Cooktop	≥43%		\$100/Burner
Rotisserie Oven	≤2200 Btuh/Bird	Small ¹	\$1,000/Oven
		Medium ²	\$2,000/Oven
		Large ³	\$3,000/Oven

Continued ...

Group 2 — Space Heating

System Type	Efficiency Requirement	Rebate Amount	* MBTUs per Unit	* Quantity =	Total Rebate Amount
Space Heating Boiler - Medium Hot Water Tier 1 (300-2500 MBtuh)	≥ 85 TE	MBtuh = \$0.50			\$
Space Heating Boiler - Medium Hot Water Tier 2 (300-2500 MBtuh)	≥ 94 TE	MBtuh = \$3.00			\$
Space Heating Boiler - LARGE Hot Water Tier 1 (2500-10000 MBtuh)	≥ 85.3 TE or ≥ 87.3 CE	MBtuh = \$0.50			\$
Space Heating Boiler - LARGE Hot Water Tier 2 (2500-10000 MBtuh)	≥ 93 TE or ≥ 95 CE	MBtuh = \$3.00			\$
Space Heating Boiler - Medium Steam (300 - 2500 MBtuh)	≥ 82 TE	MBtuh = \$0.50			\$
Space Heating Boiler - Large Steam Tier 1 (2500-10000 MBtuh)	≥ 83 TE	MBtuh = \$0.50			\$
Space Heating Boiler - Large Steam Tier 2 (2500-10000 MBtuh)	≥ 84 TE	MBtuh = \$0.50			\$

Group 3

Item	Efficiency Requirement	Rebate Amount	* Quantity =	Total Rebate Amount
Automatic Conveyor Broilers (Belt Width < 20")	See QPL*	\$1,500		\$
Automatic Conveyor Broilers (Belt Width 20-26")	See QPL*	\$1,500		\$
Automatic Conveyor Broilers (Belt Width > 26")	See QPL*	\$1,500		\$
Dishwasher, Single Tank Door Type Tier 1	(Gallons Per Rack <0.89) (Idle Energy Rate ≤0.55 kW)	\$250		\$
Commercial Dishwasher - High Temp Door Type Tier 2	<0.76* Gallons per Rack ≤0.55 kW	\$750		\$
Commercial Full-Size Convection Oven-Gas	≥ 46%	\$600		\$
Commercial Fryer Tier I-Gas 	≥ 50%	\$900		\$
Commercial Fryer Tier II-Gas 	≥ 60%	\$900		\$
Commercial Combination Oven-Gas (<15 Pan Capacity)	Steam Mode ≥38% and Convection Mode ≥44%	\$1,500		\$
Commercial Combination Oven-Gas (15-28 Pan Capacity)	Steam Mode ≥38% and Convection Mode ≥44%	\$2,000		\$
Commercial Combination Oven-Gas (>28 pan capacity)	Steam Mode ≥38% and Convection Mode ≥44%	\$3,000		\$
Commercial Steamer-Gas	≥38%	\$2,000		\$
Commercial Single Rack Oven-Gas	≥50%	\$1,000		\$
Commercial Double Rack Oven-Gas	≥50%	\$1,000		\$
Low Flow Pre-Rinse Spray Valve	≤1.07 GPM	\$20		\$
Commercial Griddle-Gas per foot	Heavy Load Cooking Energy-Efficiency ≥38%	\$150		\$
Total Rebates		Sum of All Rebate Rows Above:		\$

*Qualified Products Lists (direct)

Multi-Family Worksheet

Both dwelling units and common areas qualify for the rebates.

Group 1 — Water Heating

System Type	Efficiency Requirement	Rebate Amount	* MBTUs per Unit *	Quantity	= Total Rebate
Tankless Water Heater Tier 1	UEF 0.81	\$80	N/A		
Tankless Water Heater Tier 2	UEF 0.87	\$800	N/A		
Tankless Water Heater Tier 3	UEF $\geq 0.92-0.94$	\$800	N/A		
Central Storage WH System Tier 1	≥ 0.90 TE	\$5 per MBTU			
Central Storage WH System Tier 2	≥ 0.96 TE	\$6 per MBTU			
Central Tankless WH System Tier 1	$\geq 90\%$ TE	\$4 per MBTU			
Central Tankless WH System Tier 2	$\geq 96\%$ TE	\$5 per MBTU			
Central Boiler Tier 1 (for water and/or space heating)	90% TE	\$4 per MBTU			
Central Boiler Tier 2 (for water and/or space heating)	$\geq 96\%$ TE	\$5 per MBTU			

Group 2 — Laundry & Bath

Measure Name	Efficiency Requirement	Rebate Amount	* MBTUs per Unit *	Quantity	= Bonus Rebate
Thermostatic Restriction Valve — Shower Available with natural gas water heating equipment	N/A	\$15	N/A		
Thermostatic Restriction Valve — Shower/ Bath Combo Available with natural gas water heating equipment	1.5 GPM (MF)	\$30	N/A		
Clothes Washer Tier 1 — Front Loader Available with natural gas dryer and water heating equipment	IMEF ≥ 2.76 and IWF ≤ 3.2	\$50	N/A		
Clothes Washer Tier 1 — Top Loader Available with natural gas dryer and water heating equipment	IMEF ≥ 2.06 and IWF ≤ 4.3	\$50	N/A		
Clothes Washer Tier 2 Available with natural gas dryer and water heating equipment	IMEF ≥ 2.92 and IWF ≤ 3.2	\$75	N/A		

For Deed-Restricted Property Bonus Only (Multi-family)

Deed-restricted Type: (Check All that Apply)

General Obligation Bonds Low-income Tax Credits Properties owned by HUD Local, State, or Federal Loans or Grants

Tax-exempt mortgage revenue bonds Owned or controlled housing for federally-recognized tribal members

Housing legally controlled by local housing authorities, non-profit organizations or other owners where:

- The building is deed- or contract-restricted to house low-income tenants under an agreement with HUD, the California Department of Housing and Community Development and/or the State Treasurer's Office restricting rents to affordable levels based on tenant income levels
- That are regularly verified by HUD or the specified state agency.

Other (specify)

Deed-restricted Property Verification (Required)

By checking this box, I acknowledge and understand that if I am submitting for a deed-restricted property bonus, the project must meet the definition of "deed-restricted" as defined by California Public Utilities Code (CPUC) Section 2852(a)(3)(A) and further modified by the CPUC as a residential property financed with low-income tax credits, tax-exempt mortgage revenue bonds, general obligation bonds, or local, state, or federal loans or grants. SoCalGas reserves the right to require documentation of deed restrictions.

Request for Payment Form

Complete this form to request payment for completed units in multi-family or commercial new construction projects. You can fill it out on your computer and then print it out for submittal. Payment will be sent to the Applicant on file unless you fill out and sign the **Third Party Payment Authorization** below.

Reservation Number:	Production Home Phase Number:	Number of Homes in Phase:
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Applicant/Payee Information (Only fill in and sign below if changed since Application)

Applicant/Builder Name		
SoCalGas Representative	Payee Name	
Federal Tax ID (or) Social Security	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Individual <input type="checkbox"/> Partnership If exempt, describe why:	
Payee Address	Payee City, State	Payee ZIP Code

Project Contact Information

Authorized Project Contact	Authorized Contact Telephone Number
Email	

Third Party Payment Authorization

As the Applicant, I request that my CARB rebate be remitted to the third-party Payee named below. I understand that I will not be receiving the rebate check I understand that my release of the payment to the Payee does not exempt me from the program requirements outlined in this Agreement. I also understand that SoCalGas will report rebates greater than \$600 as income on Form 1099 to the third-party payee unless I have marked the "Corporation" or "Exempt" tax status box for the payee below. SoCalGas is not responsible for any taxes that may be imposed as a result of this rebate.		
Make Rebate Check Payable to:		
Payee First and Last Name:		
Payee Company:		
Federal Tax ID (or) Social Security	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Individual <input type="checkbox"/> Partnership If exempt, describe why:	
Payee Address	Payee City, State:	Payee ZIP Code
Applicant Name:	Applicant Signature:	Date:

Supporting Documentation Required

1. Project sites address list (if more than one home in the project)
2. Proof of purchase – A signed Attestation of Equipment Installation will be required to be submitted with each Request for Payment Form.
3. Proof of LEED or WaterSense certification - A copy of the notification of certification or other record that documents the certification (applicable to multi-family customers only).

Email the completed Application and Agreement Form, along with the other required documentation with proof of purchase(s) to CARB@socalgas.com.

Applicant Name

Authorized Signature

Date