



MULTIFAMILY WHOLE BUILDING PROGRAM 2022 APPLICATION

EFFICIENCY INCENTIVES FOR YOUR MULTIFAMILY PROPERTY

SoCalGas invites you to participate in the Multifamily Whole Building Program. The program offers energy consultation and assessment to multifamily property owners and managers. Learn ways to improve tenant comfort, help reduce energy use, apply for energy-efficient incentives, and secure your investment for the future.

HOW THE PROGRAM WORKS

1. APPLY FOR THE PROGRAM

Submit this application form to convey interest in participating in this program and complete a Notice to Proceed (NTP) which allows a program personnel to visit the property.

2. IDENTIFY ENERGY EFFICIENCY OPPORTUNITIES

A Technical Assistant (TA) is provided to help assess property energy performance, upcoming projects, operation/ maintenance issues, high-potential properties, and potential upgrade opportunities.

3. CONDUCT PROPERTY ENERGY ASSESSMENT*

The TA schedules an in-depth evaluation of building energy systems with a no-cost virtual audit to identify potential energy-efficient upgrades and conducts an analysis to determine potential utility incentives available. In addition, the TA helps select a scope of work that meets both the program requirements and project goals.

* Subject to SoCalGas and California Public Utilities Commission review and approval.

4. RESERVE YOUR ENERGY EFFICIENCY INCENTIVE

The property owner or property manager signs an incentive reservation letter and then the program funds are reserved for the project.

5. CONDUCT PROPERTY RETROFIT AND INSTALL ENERGY EFFICIENCY EQUIPMENT

Select a qualified, licensed contractor to perform installations. The TA is available to assist the property owner or manager throughout this process.

6. PROJECT COMPLETION

The TA performs a final site verification of installed equipment. Then collects the required project close-out documents per program guidelines and submits the package to SoCalGas for final review after which the incentive is disbursed.

FOR MORE INFORMATION

Contact our team today to receive a comprehensive overview of the many energy efficiency solutions available for multifamily properties.

P: **562-417-6355** | E: **LDiazVil@socalgas.com**

For more information visit our website:
socalgas.com/WholeBuilding

PROGRAM ELIGIBILITY REQUIREMENTS

- Natural gas service must be provided by SoCalGas.
- Property must be existing construction. New construction projects are not eligible.
- Both market rate and affordable housing properties are eligible.
- Property must have three or more dwelling units.
- Eligible properties are served on first-come, first-served basis.
- Must use licensed contractor, as appropriate to install program measures.
- Must commit and show proof of financial ability to see project to completion.
- Upgrades must be started in 2022 and completion date must be approved by SoCalGas.
- May only begin work after a confirmation of reservation approval is received from SoCalGas.
- Must install one major capital improvement minimum (defined in next column).
- Must undertake a minimum of three products in order to be eligible (including at least one Core Product).
- The property owner or property manager (as authorized agent for property owner) must provide proof of finalized permits when required.
- SoCalGas may conduct a project inspection (in-person or virtually) to verify the energy efficiency product installation prior to incentive payment.
- You may not receive an incentive for the same product or replacement of a product from more than one California Investor-Owned Utility participating in this program or other third party programs offering rebates, financing and other incentives, funded by the California Public Utilities Commission. An owner cannot receive an incentive for any product for which they received an incentive or rebate from SoCalGas in the prior five years.

*The amount of the incentive is based upon simulated gas energy savings for the chosen scope of work and is calculated by the program Technical Assistant.

**Incentives offered by the Multifamily Whole Building Program are intended to help offset the cost of comprehensive energy efficiency upgrades. The total incentive amount cannot exceed measure and installation cost.

MAJOR CAPITAL IMPROVEMENT REQUIRED

Major capital improvements also known as natural gas core products include:

- New domestic hot water equipment, new space heating equipment (boiler or furnace, etc.) or envelope improvements (windows, attic, wall, floor insulation).
- Core upgrade needs to serve at least 75% of units on the property.
- Boilers/furnaces installed must be a minimum of 90% thermal efficiency.

Other allowable improvements can include natural gas non-core products, but are not limited to:

- Pool/spa boilers, showerheads/aerators, pipe insulation, controls, DHW demand recirculation pump controls, smart thermostats, and appliances (washing machines, dishwashers).

ENERGY EFFICIENCY INCENTIVES

The incentive amount corresponds to the level of energy efficiency achieved.

Natural Gas Savings*	Incentive per Dwelling Unit**
5%	\$300
7.5%	\$425
10%	\$570
12.5%	\$630
15%	\$750

The program will implement maximum incentive levels based on the type of property.

- **Market rate projects** can be incentivized up to 50% of total project cost. Market rate is defined as any property that is not Affordable as defined below.
- **Affordable projects** can be incentivized up to 65% of project cost. To qualify for the Affordable Incentive Path (AIP), a project must be classified as a Disadvantaged Community (DAC) or Hard to Reach (HTR). To determine if a property qualifies as either DAC or HTR, please contact program support staff. Additionally, projects that meet the Energy Savings Assistance Program guidelines are also eligible for the AIP. Please contact program staff to determine eligibility.

Please note the total project incentive will be based on either the tiered incentive structure determined by number of dwelling units at the property OR the maximum incentive level permitted, whichever is lower. Refer to general program guidelines.

GENERAL PROGRAM GUIDELINES

GENERAL

- Customers eligible for the Multifamily Whole Building Program must have an active, valid SoCalGas account with qualifying equipment that is operational and ready for inspection.
- The incentive amount cannot exceed the cost of purchasing and professionally installing your equipment/product.

ELIGIBILITY REQUIREMENTS

- Equipment must meet the requirements of the program as outlined in this guide. SoCalGas reserves the right to verify installation and deny payment for products that do not meet the requirements of the program.
- All equipment must be new natural gas equipment. Used or rebuilt equipment is not eligible. Fuel switching (changing from electricity to gas or from gas to electricity) does not qualify.
- Qualified equipment must be installed at the property served by the SoCalGas account listed on the application and must be installed and operational according to state local building codes, ordinances and/or manufacturer's requirements. A copy of the closed permit will be required when applicable.

PROGRAM LIMITATIONS

- No incentive will be paid for replacements of equipment types at the property which has received a rebate or incentive from SoCalGas within the last five (5) years.

ENERGY EFFICIENCY FINANCING

Are you looking at implementing energy efficiency projects? Reducing energy consumption and improving efficiency is always a smart investment. The California Alternative Energy and Advanced Transportation Financing Authority, among others, has developed financing options to meet your business needs including state-backed financing options and zero-percent financing for eligible customers. For more information, visit socialgas.com/financing

PAYMENT

An incentive check for qualified equipment is generally mailed 45 business days after SoCalGas approves the final closeout packet that includes all required documentation.

USING A LISENCE CONTRACTOR

Hiring a licensed contractor who obtains the required building permit and has knowledge of, and complies with, local codes, ordinances and the requirements of the Building Energy Efficiency Standards (State Administrative Code, Title 24, Part 6) increases the likelihood that your system will be properly installed and will work efficiently, quietly and safely.

ENERGY EFFICIENCY BENCHMARKING

The California Energy Commission (CEC) has established regulations for a new statewide whole-building energy use and public disclosure program under California Assembly Bill 802 (AB802). This statute went into effect on January 1, 2017, and the regulations require "covered" commercial, mixed use and multifamily building owners to complete an annual energy performance benchmark via ENERGY STAR® Portfolio Manager®, and for some of those covered buildings there is an additional requirement to disclose your Portfolio Manager rating to the CEC.

SoCalGas can assist with getting your usage data, so you can meet your benchmarking obligations for AB 802 or other local benchmarking ordinances.

For more information, visit socialgas.com/benchmarking

The Multifamily Whole Building Program 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 customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. SoCalGas does not endorse, qualify or guarantee the work of any third party contractor utilized in connection with this program.** Customers who choose to participate in this program are not obligated to purchase any additional services offered by any such contractor. Eligibility requirements apply; see the program conditions for details.



2022 MULTIFAMILY WHOLE BUILDING PROGRAM APPLICATION

(ALL ITEMS ARE REQUIRED; INCOMPLETE APPLICATIONS WILL NOT BE PROCESSED AND WILL BE RETURNED.)

SECTION 1: ACCOUNT INFORMATION

(as it appears on your SoCalGas bill)

SoCalGas Account Number

Facility Square Footage

Number of Dwelling Units at Property

Name (as it appears on your SoCalGas bill)

Business DBA Name

Service Address (as it appears on your SoCalGas bill)

Unit/Suite Number

City

State

ZIP

Contact Name

Contact Title

Contact Phone Number

Fax Number

Contact information belongs to:

☐ Property Owner

☐ Property Manager (as authorized agent
for Property Owner)

Email Address

PROPERTY OWNER OR MANAGER SIGNATURE (original or digital signature required)

☐ I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCTS FOR WHICH I AM REQUESTING AN INCENTIVE MEET THE REQUIREMENTS LISTED ON THE PROGRAM ELIGIBILITY REQUIREMENTS.

Check One: ☐ Property Owner ☐ Property Manager (as authorized agent for Property Owner)

As applicable: ☐ By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

Print Name

Signature

Date

The Multifamily Whole Building Program 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 customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. SoCalGas does not endorse, qualify or guarantee the work of any third party contractor utilized in connection with this program.** Customers who choose to participate in this program are not obligated to purchase any additional services offered by any such contractor. Eligibility requirements apply; see the program conditions for details.

Must be completed fully to be processed.

SoCalGas Account Number

Name (as it appears on your SoCalGas bill)

Check One: ☐ Property Owner ☐ Property Manager (as authorized agent for Property Owner)

Name _____Daytime Phone NumberEmail

Site or Complex Name

Site Contact Person/Inspection ContactTitleSite Contact Daytime Phone NumberService Address (address on the SoCalGas bill if different from site address)CityZIP

Rate Schedule (GR.GM)

Tax Status: ☒ Corporation ☐ Non-corporation ☐ Exempt (e.g., tax exempt, non-profit)

Payee Name (make check payable to)Federal Tax ID Number or SSNMailing AddressCityZIP

PAYMENT RELEASE AUTHORIZATION (signature required)

Property owner or property manager (as authorized agent for property owner):

Your authorization is required if the check is to be made payable to another individual or entity. Please sign below.

PROPERTY OWNER OR PROPERTY MANAGER (AS AUTHORIZED AGENT FOR PROPERTY OWNER): Your authorization is required if the incentive check is to be made payable to another individual or entity. By signing below, I am authorizing this payment of my incentive to the third party ("Payee") named above and I understand that I will not be receiving an incentive check from SoCalGas. I also understand that my release of the payment to the Payee does not exempt me from the requirements outlined in this application. If Payee is a business, federal tax ID or Social Security Number must be provided. SoCalGas will report this payment made to the third party on IRS form 1099 as "Other Income" to you (the customer receiving the benefit of the payment) unless the payment is less than \$600, or you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the tax requirements of incentives. SoCalGas is not responsible for any taxes that may be imposed on you as a result of this incentive.

Print NameSignatureDate _____

Incentives are generally considered subsidies for tax purposes and could be taxable income. You are urged to consult your tax advisor concerning the taxability of this incentive. Incentives greater than \$600 will be reported to the IRS on Form 1099 unless you have checked corporation or exempt tax status above on Payee Information. SoCalGas is not responsible for any taxes that may be imposed on your business as a result of your receipt of this incentive.

I understand that I cannot receive a rebate or incentive for the same product or equipment from more than one California investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with California Public Utilities Commission Public Purpose Surcharge funds.

SECTION 2: TERMS AND CONDITIONS

1. I certify that I am an eligible SoCalGas customer and I have installed the indicated energy-saving products in 2022 for use in my property and not for resale or otherwise. I understand that incomplete and incorrect Applications will not be processed.
2. I am a Property Owner or Property Manager (as authorized agent for Property Owner), of a residential multifamily dwelling occupied by customers with a valid meter(s) served by SoCalGas. I understand that I am only eligible to receive an incentive for products that correspond directly to the type service (i.e., natural gas distribution) for which my residential multifamily dwellings currently receives service from SoCalGas. Multifamily dwellings are defined as residential apartments, homeowners' associations and/or mobile home parks with two or more units. New construction does not qualify
3. I will allow, if requested, a representative from SoCalGas, the California Public Utilities Commission (CPUC), or any authorized third-party reasonable access to my property to verify the installed product before an incentive is paid. I understand that an incentive will not be paid if I refuse to participate in any required verification.
4. I understand that this project may be selected for evaluation studies and/or program measurement by external contractors appointed by the CPUC. These studies are used to analyze and improve program performance. I agree to participate by responding to inquiries from these external contractors.
5. I certify that the information on this form is true and correct, and that the tax ID provided is accurate. I understand that payments are based on related energy benefits over the life of the product. I agree to:
 - Maintain the energy-efficient equipment specified in the Application form
 - 100% functional for the life of the product or a period of five (5) years from receipt of incentive funds
6. I understand that this program, or individual measures, may be modified or terminated without prior notice.
7. I understand that this form and the paid itemized invoice must be received by SoCalGas with the closeout documentation. I acknowledge that I would not have undertaken an energy efficiency equipment upgrade at this time if SoCalGas had not offered a monetary incentive.
8. In the event that I choose to participate in the On-Bill Financing Program (OBF) offered by SoCalGas to obtain financing for the products listed on this form, I understand that the OBF terms and conditions will control (including, without limitation, the incentive amount for the products listed here) if there is any conflict between the Multifamily Whole Building Program terms and conditions and OBF.
9. In no case will SoCalGas pay more than 100 percent of the actual purchase price of the items to be incentivized or the maximum allowance per unit. Purchase price includes materials cost plus installation labor. Customers who self-install may not charge installation labor.
10. This Program has a limited budget. Incentive forms will be accepted on a first-come, first-served basis, until allocated funds are no longer available.
11. I have followed applicable permitting requirements for this installation. I have also used a licensed contractor to install any space-heating boilers and any other equipment.
12. I have not received rebates, incentives or services for the same equipment from other utilities, states or local programs funded by the Public Purpose Program Surcharge (PPPS). However, I understand that water utilities are not funded by the PPPS and I may apply for their rebates.
13. I understand incentives are taxable, if greater than \$600 for business customers, and will be reported to the IRS on Form 1099 unless I have identified myself as a corporation or exempt. I am urged to consult my tax advisor concerning the taxability of incentives. SoCalGas is not responsible for any taxes that may be imposed on me or my property as a result of receipt of this incentive.
14. I understand and agree that the choice of the energy efficiency products, selection of contractor, manufacturer, or dealer, purchase of materials, work performed, and the payment thereof are my sole responsibility. I understand that SoCalGas makes no representations regarding products, contractors, manufacturers, dealers, materials or workmanship. I also understand that SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of the products or measures. I waive any and all claims against SoCalGas, its parent companies, its directors, officers, employees and authorized agents, (collectively, the "SoCalGas Parties") and will indemnify the SoCalGas Parties for any claims arising out of or relating to the installation and/or use of the energy efficiency product(s) referred to in this Application. Without limiting the generality of the foregoing, none of the SoCalGas Parties shall be liable hereunder for any type of damages, whether direct, indirect, incidental, consequential, exemplary reliance, punitive or special damages, including damages for loss of use, regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind. I agree that the SoCalGas Parties have no liability whatsoever concerning the quality, safety or installation of the energy efficiency products, including their fitness, workmanship or any other matter.
15. I understand the SoCalGas Parties are not responsible for items lost or destroyed in transit.