

Energy Upgrade California Utility Programs

CEP Team Leaders Meeting
Brea, March 23, 2011

Reduce energy use. Save money. Create jobs.



Energy Upgrade California

- Through the Energy Upgrade California Program, Federal, State and local utilities offer incentives that make energy-saving house projects affordable
 - Encouraged customers and contractors to approach the house as a collective savings opportunity rather than a group of individual systems
 - Solutions to overcome participation barriers with:
 - Rebates/incentives
 - Financing
 - Education/awareness
 - Contractor training



The screenshot shows the Energy Upgrade California website. At the top right is the logo with the text "energy upgrade CALIFORNIA" and a green leaf icon. Below the logo is a photograph of three people (two men and one woman) standing in front of a house, looking at a document. To the right of the photo is a text block describing the organization as a one-stop-shop for home improvement projects. Below this is a list of uses for the website. At the bottom of the main content area are two yellow buttons: "Why Upgrade Now?" and "Get Started!". Below these buttons is a section titled "Upgrade Updates" with two articles: "Go Green, Get Green" and "Meet the Sanchez Family". At the very bottom is a navigation bar with links for "home", "about", "press room", "contact us", "terms of service", and "Explore Engage 360".

energy upgrade™ CALIFORNIA

Energy Upgrade California is your one-stop-shop for home improvement projects that lower your energy use, conserve water and natural resources, and make your home healthier and more comfortable.

Use this website to:

- Plan your upgrade projects
- Locate participating contractors
- Find rebates and incentives

Reduce energy use.
Save money.
Create jobs.

Why Upgrade Now?
Learn about the benefits of an Energy Upgrade
[Go »](#)

Get Started!
Enter your county name to find local rebates and contractors

[Go »](#)

Upgrade Updates

Go Green, Get Green
Using eco-friendly materials like recycled content insulation helps conserve resources and can increase the value of your home.

Meet the Sanchez Family
The Sanchez family is aiming for 35% energy savings—resulting in a more comfortable home that may reduce their bills.

[View more »](#)

[Find out more](#) | [For contractors](#) | [Sign up for e-updates](#) | [News](#) | [Events](#)

[home](#) | [about](#) | [press room](#) | [contact us](#) | [terms of service](#) | [Explore Engage 360](#)

Program Overview

Energy Upgrade CA IOU Rebate Objectives:

- Help to offset high costs
- Rebate from a trusted energy advisor
- Create line of sight between single measure rebates and comprehensive improvements
- Aggregate current single measure rebates in larger and comprehensive rebate offering

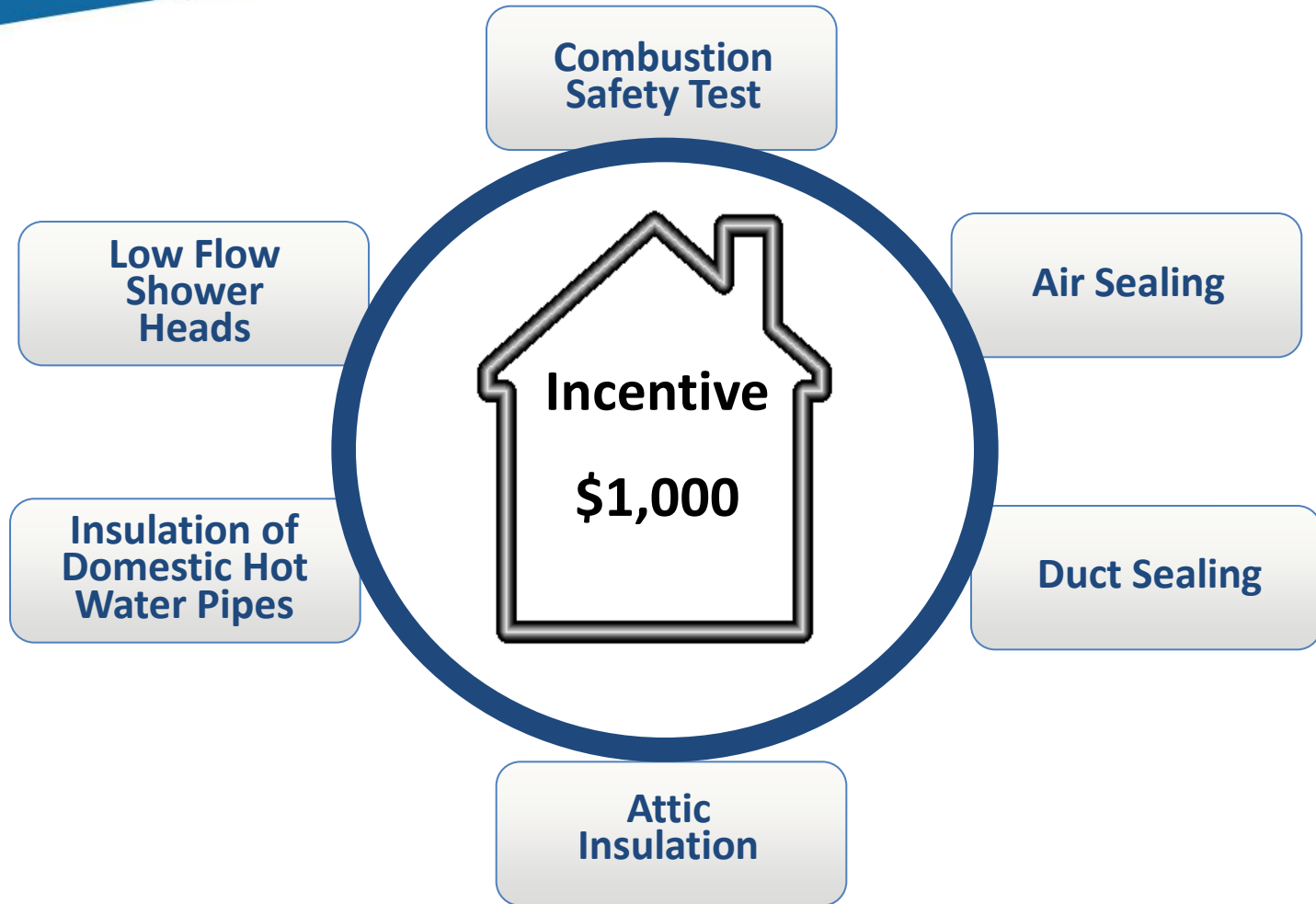


Rebates

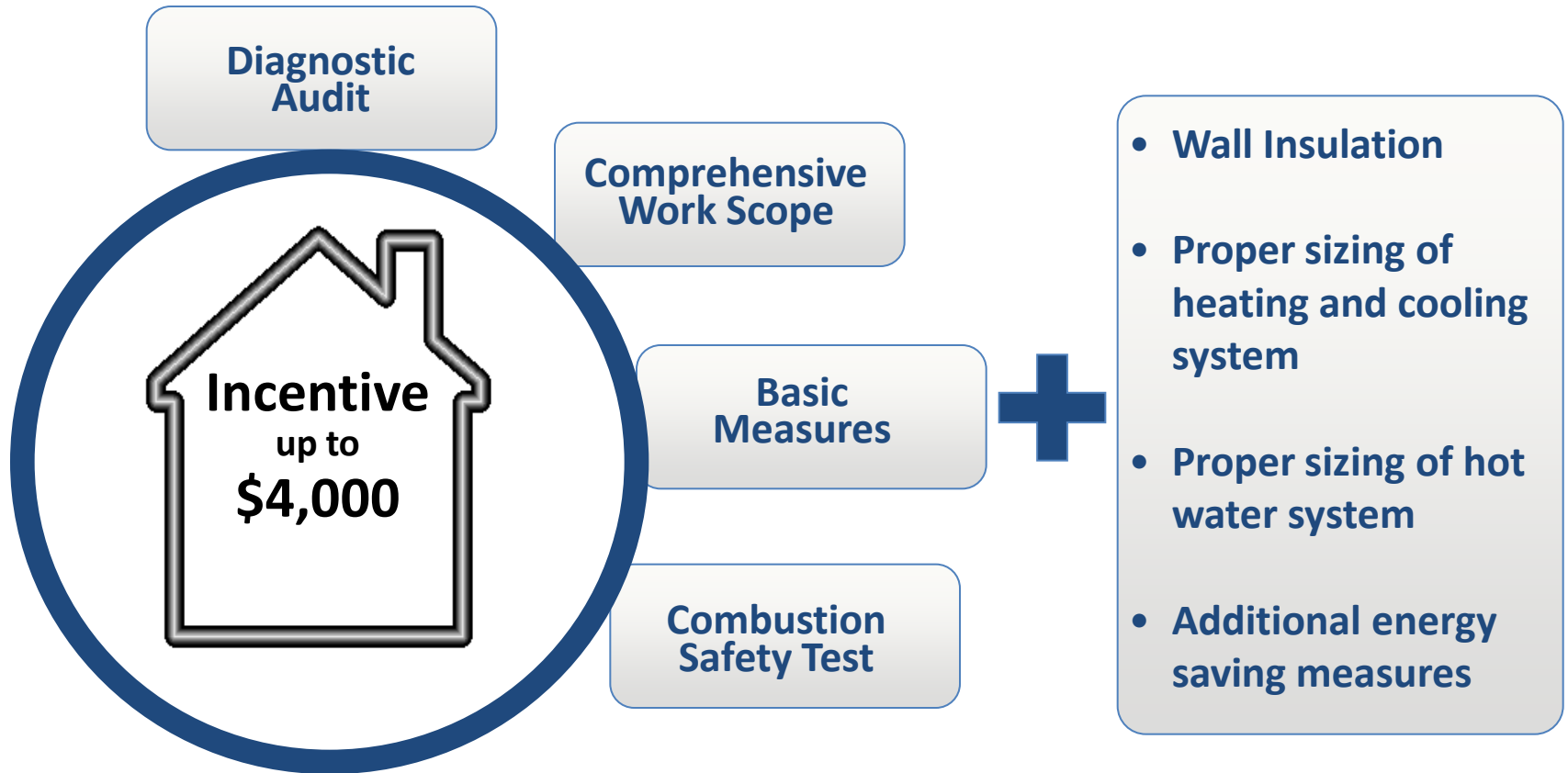
Savings: % Reduction	Rebate Amount
<i>Basic Package*:</i>	<i>\$1,000</i>
10% (SCE/SCG/SDG&E)	\$1,250
15% (PG&E)	\$1,500
20%	\$2,000
25%	\$2,500
30%	\$3,000
35%	\$3,500
40%	\$4,000

* 10% average savings

Basic Package



Advanced Package



Advanced Package

List of possible measures include, but are not limited to the following:

- Basic Package, plus
- Wall and Floor Insulation
- Distribution System
- Heating Equipment
- Cooling Equipment
- Variable Speed Motor Air Handlers
- Cool Roofs
- Low Flow Shower Heads
- Crawl Space Insulation
- Radiant Barriers
- Refrigerant Charge and Airflow
- Energy Efficient Windows
- And more...

Customer Benefits

- Coordinated messages from utilities, local governments, and contractors
- Benefits:
 - Increased comfort
 - Energy savings & Lower utility bills
 - Contractor facilitates application process
 - Complete all work at once
- A customer incentive check from utilities
 - Split incentive in SMUD & SoCal Gas
- Quality assurance
- Combustion safety testing

Customer Eligibility

- Eligibility:
 - Utility customer
 - Single family residential customer
 - Work performed by participating contractor(s)
 - Meet all program specifications and guidelines
- Best Candidates for Participation:
 - Customers with the ability to reduce energy usage, through basic or advanced upgrades, by at least 10%

Contractor Requirements

Including but not limited to:

- Basic and Advanced:

- CSLB License in the appropriate specialty
- Bonding, insurance and in good standing
- Signed Contractor Participation Agreement
- Completion of Program Orientation Course
- Combustion Safety test performed by a certified BPI Analyst

- Advanced:

- General Contractor's license
- BPI Certification of individuals on payroll
- Training and proven ability to operate CEC-qualified software to generate comprehensive work scopes and recommendations

Quality Assurance

- Contractor screening
- Emphasis on combustion safety
- Participant and partner satisfaction surveys
- Third-party in-field verification (aligned with Home Performance with ENERGY STAR®)
 - Tier 1 – 3 of the first 5 jobs completed by a new contractor
 - Tier 2 – After the first 5 jobs, at least 4 of the next 20 jobs
 - Tier 3a – 5% of jobs (after 25 jobs)
 - Tier 3b – 2% of jobs by BPI-Accredited contractors (after 25 jobs)
- Management of corrective actions through program implementers

Statewide Materials

- Contractor Materials

- 3-Piece Sales and Marketing Toolkit
 - What is Energy Upgrade California?
 - Reasons/benefits of a retrofit
 - Checklist to help clients determine qualifications
- Email Templates
 - Acquisition, warm-lead follow-up, and closing sale thank you
- Fact Sheet

- Customer Facing Materials

- Brochure
- Program Posters
- Direct Mail Piece
- Print Ad

EUC Program Brochure

Upgrade your home.
And upgrade your
bank account by up
to \$4000.



**energy
upgrade**
CALIFORNIA

www.EnergyUpgradeCA.org

Why should you upgrade?

Incentives

You can get incentives of up to \$1,000—and even up to \$4,000, depending on the type of upgrades you make. That's money in the bank for something you may want to do anyway.

Lower bills

Upgrading your home to be more energy efficient can mean much lower bills every month.

Comfort

When your home is more energy efficient, it's more comfortable—cozy and warm in the winter and cool in the summer.

Participating contractors

Contractors participating in this program are specially trained and find improvements that an average homeowner wouldn't. They may find you more energy savings that will save you money.

The environment

Making your home more energy efficient helps the environment, an important step that everyone should take.

What is a whole-house approach?

Instead of doing a few home improvements here and there to make your home more energy efficient, think about your whole home as a complete system. Heating, air-conditioning, and water all work together to help you live comfortably while lowering your bills. And Energy Upgrade California gives you the professional resources you need to take a whole-house approach.

There are two upgrade packages that qualify for rebates and incentives.

Basic Upgrade Package

The Basic Upgrade Package focuses on the building shell—including installing and upgrading insulation and patching duct work. This package qualifies for incentives of up to \$1,000.

Advanced Upgrade Package

The Advanced Upgrade Package is a comprehensive plan focused on the basic upgrade package components, plus installing new systems (heating, cooling, and water heaters), replacing ductwork, upgrading single-pane windows, and more. This package qualifies for incentives of up to \$4,000.

Basic Package:

- Air sealing
- Attic insulation
- Duct sealing
- Hot water pipe insulation
- Thermostatic shut off valve
- Low-flow showerheads (recommended)
- Smoke detectors and carbon monoxide monitors
- Combustion safety testing

Advanced Package Options:

- High-efficiency furnace
- Energy-efficient cooling
- Water heater system
- Energy-efficient windows
- Duct replacement
- Wall insulation
- Energy-efficient lighting fixtures
- Other custom energy-saving measures

How to get started.

If you live in a single-family home, you may qualify for these types of incentives. Visit www.EnergyUpgradeCA.org for more information or contact a participating contractor for a home energy assessment.

EUC Program Handout



What is Energy Upgrade California™?

Energy Upgrade California is a program created to help increase energy-efficient upgrades to homes throughout the state. It's a partnership between California's Energy Commission and Public Utilities Commission and is financially supported by local utility companies. The purpose is to reduce energy use throughout California by offering incentives of up to \$4,000 to homeowners for a limited time.

So if you're ready to do more than turn down your thermostat to make your home more energy efficient, consider upgrades designed to make your systems work together to help lower your energy bills. You could qualify to receive incentives just for making upgrades to your home.

Energy Upgrade California is a win-win for everyone. California wins with decreased long-term energy use, and homeowners win by saving money.

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What types of upgrades qualify for incentives?

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Energy Upgrade California™ is brought to you in part by your local utilities:



Energy Upgrade California™ is an information, advisory, and financing program administered by the Energy Upgrade Center (EUC) located at 1000 S. Bascom Avenue, Suite 1000, San Jose, CA 95128. Energy Upgrade California is a partnership between the Energy Commission and Public Utilities Commission. Incentives are provided by participating contractors and utility companies. Energy upgrade offers an administration and financing option.

This program may be modified or discontinued without notice and without any obligation to qualified customers. If that occurs, the program may be modified or discontinued without notice. The program is subject to change without notice. The program is subject to change without notice. The program is subject to change without notice.

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How to Participate:

- Whole House Program:
 - To find a participating home performance contractors visit the Energy Upgrade California website:
www.EnergyUpgradeCA.org
- Utility Websites:
 - PG&E - www.pge.com/EnergyUpgradeCA
 - SCE - www.sce.com/residential/rebates-savings/home_upgrade_projects
 - SCG - www.socalgas.com/upgrade
 - SDG&E - www.sdge.com/residential/energyupgrade