



**PROGRAM CHANGES QUICK REFERENCE GUIDE**

**Summary of Home Upgrade Proposed Program Changes**

All changes outlined here go into effect for projects reserved on or after January 1, 2017 and/or post-retrofit submitted on or after April 1, 2017 unless otherwise noted.

**1. PROGRAM STRUCTURE CHANGES**

- Removal of points and move to dollars per measure.
- Maintain participation threshold at minimum of 10% savings as measured by the Home Upgrade Energy Savings and Incentive Calculator and/or minimum rebate total of \$1,200.
- Incentive cap of 50% of project cost and/or maximum incentive of \$3,000 remains the same.

**2. REDUCED BARRIERS**

- Base Measure required on first project submission only and three minimum measures total required for every project. Reminder: All projects submitted must meet all program requirements independently.
- Implementation of the Test by Measure (TBM) approach currently used for the SoCalGas-only Program:

2016 Requirement	2017 Requirement
Projects reserved prior to January 1, 2017 and/or post-retrofit submitted prior to April 1, 2017.	Projects reserved on or after January 1, 2017 and/or post retrofit submitted on or after April 1, 2017.
Full test-in and test-out are required.	Test by measure approach, full test-in recommended.
BPI Building Analyst Certification test-in form.	Test-out requirements determined by measures completed.
BPI Building Analyst Certification test-out form.	Required testing forms determined by measures completed.

- Required testing by measures completed:

Installed Measure	Combustion Safety <sup>1</sup>	Blower Door	Duct Test <sup>2</sup>	Appliance Ambient/ Gas Appliance Gas Leak Test	None
Attic Insulation	✓	✓			
Duct Sealing			✓		
Whole Building Air Sealing	✓	✓			
Wall Insulation	✓	✓			
Floor Insulation					✓
Domestic Hot Water System – Gas				✓	
Domestic Hot Water System – Electric					✓
Cooling System			✓		
Heating System – Gas			✓	✓	
Heating System – Heat Pump/Hydronic			✓		
Duct Insulation					✓

<sup>1</sup> To be completed by a Building Performance Institute (BPI) Building Analyst (BA)

<sup>2</sup> A CF3R, CFM25 result or a date stamped photo of CFM25 result may be submitted to meet duct leakage requirement. If a CF3R is submitted, QC Duct Testing will be streamlined if the project is chosen for inspection.



### 3. MEASURE SPECIFICATION AND INCENTIVE UPDATES

Measure	Requirements	Current Incentive	SoCalGas	SCE/ SoCalGas
Duct Leakage (Base)	Seal to ≤ 10% (Duct leakage to outside)	\$250	\$250	\$200
	Seal to ≤ 6% (Duct leakage to outside)	\$650	\$650	\$350
Whole Building Air Sealing (Base)	≥ 15% leakage reduction	\$250	\$250	\$0
	≥ 30% leakage reduction	\$450	\$450	\$300
Attic Insulation and Attic Plane Sealing (Base)	<b>R-38 in all climate zones</b> (R-19 if there is less than 24" of attic clearance) (Insulation must be installed in 50% or more of all accessible attic area)	\$550	\$550	\$400
	≥ R-44 (Insulation must be installed in 50% or more of all accessible attic area)	\$650	\$650	\$500
Wall Insulation	Insulate ≥ <b>R-13 for 2 x 4 and R-19 for 2 x 6</b> (Must insulate 50% or more of all wall surface area)	\$500	\$500	\$400
Floor Insulation	Insulate ≥ R-19 (Must insulate 50% or more of all accessible floor area)	\$550	\$550	\$400
Duct Insulation	Insulate ≥ R-8 (Insulate all accessible ducts, at least 50%)	\$400	\$400	\$250
Natural Gas Central Furnace	≥ 92% AFUE	\$600	\$600	\$350
	≥ 95% AFUE	\$700	\$700	\$400
Natural Gas Gravity Wall Furnace	≥ 70% AFUE (When replacing an existing gravity wall furnace, not fan assisted)	\$400	\$400	\$250
Split/Packaged Central Air Conditioner/Heat Pump	≥ 15 SEER (≥ 80% AFUE for Packaged Systems or ≥ HSPF 8.0 for Heat Pumps)	\$750	\$750	\$500
High Performance Dual-Pane Windows	U-Factor ≤ <b>0.30</b> and SHGC ≤ 0.25 (Must replace a minimum of 14% of the conditioned floor area; if 100% of the residential windows is less than 14% then all windows must be replaced.)	\$700	\$700	\$0 (Advanced Home Upgrade - only)
Gas Storage Water Heater	EF ≥ 0.67 and ≥ 30 gallons <b>and ≤55 gallons</b>	\$350	\$350	\$200
	EF ≥ 0.70 and ≥ 60 gallons <b>and ≤55 gallons</b>	\$450	\$450	\$300
Gas On-Demand Water Heater	EF ≥ 0.82	\$900	\$900	\$500
Hybrid Electric Heat Pump Water Heater	EF ≥ 2.00 and ≥ 40 gallons	\$400	\$400	\$500
Additional for second base measure		\$150	\$150	\$0
Additional for third base measure		\$200	\$200	\$0
Thermostatic Shut-off Valve (TSV)	Max 1 per home for energy savings and incentive. Does not count as a base or flex measure.	NA	NA	\$25
Low Flow Shower Head +TSV combo	Must be ≤ 1.7 GPM; Max 1 per home for energy savings and incentive. Does not count as a base or flex measure.	NA	NA	\$40

**Note:** Items in red indicate that there was a code change that impacted the minimum specification requirements.



## Summary of Advanced Home Upgrade Program Changes

All changes outlined here go into effect for projects reserved on or after January 1, 2017 and/or post-retrofit submitted on or after April 1, 2017 unless otherwise noted.

### 1. PROGRAM STRUCTURE CHANGES

- Replace Base and Kickers with a Rate per percentage point structure (\$130 per percentage point).
  - **Example—Project with 22% final energy savings and a \$10,000 project cost: Incentive = 22 x \$130 = \$2,860.**
- Cap of 50% of project cost.
- Updates to measure specifications due to code changes (see Home Upgrade Section).
- Pool Pump incentive is now \$300.

## Summary of other Program-Wide Changes

1. Program will enforce Senate Bill 1414 Proof of Permit Closure.

2016 Requirement	2017 Requirement
Proof of permit application when applicable.	Proof of permit closure when applicable. Effective for all projects in the system on January 1, 2017.

## Timeline of Program Wide Changes

December 31, 2016	January 1, 2017	March 31, 2017	April 1, 2017
<ul style="list-style-type: none"> <li>• EnergyPro projects must be post-retrofit submitted.</li> <li>• Last day to reserve under 2016 Program requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• Projects reserved on or after this date will have new 2017 Program requirements apply.</li> </ul>	<ul style="list-style-type: none"> <li>• All projects reserved December 31, 2016 or prior must be post-retrofit submitted to maintain 2016 Program requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• All projects reserved or post-retrofit submitted on or after this date will have 2017 Program requirements apply.</li> </ul>

**Energy Upgrade California® Home Upgrade** provides assistance and incentives for home improvement projects that can reduce energy use and make homes more comfortable. This statewide program is managed locally by utilities and regional energy networks and directed by the California Public Utilities Commission in collaboration with the California Energy Commission. Funding comes from utility customers under the auspices of the California Public Utilities Commission. Incentives are offered on a first-come, first-served basis and are effective until the funding is expended or the program is discontinued. Terms and conditions apply. See program rules for details. Programs may be modified or terminated without prior notice. ©2017 Southern California Edison and Southern California Gas Company. Trademarks are property of their respective owners. All rights reserved.