TECH Clean California: Multifamily Program Overview

06/01/2023



Zoom Q&A

Click on the "Q&A" button at the bottom of your screen.

You may need to "hover" or click on your screen for that option to appear.





Program Overview

Budget & Eligibility

Available Incentives

Equipment Requirements

Submittal Process

Resources

Contact

Q&A

Program Overview

What is TECH Clean California?



- California's statewide program to promote adoption of heat pump space heating and heat pump water heating.
- Over 1,000 California contractors already participating.
- Over \$31 million in heat pump incentives paid in 2022.
- Over 13,000 heat pump projects funded.

Budget & Eligibility

Budget

- Single-Family Heat Pump HVAC: \$22M available Statewide
- **Single-Family HPWHs**: \$80M+ (launching ~Q3 2023)
- Multifamily: First round of reservations opened June 13th, 2023, Second round opens September 6th, 2023
- All funding is allocated first come first serve, and is reserved upon incentive reservation approval
 - Funding is not guaranteed unless reservation is submitted and approved while incentives remain
 - Participants will be notified when budgets drop below certain thresholds, and communications will increase in frequency as budget gets closer to \$0

Save this page to stay up-to-date on the TECH Budget <u>https://techcleanca.com/public-data/budget-report/</u>

Multifamily Budget

	Reservations Open	Equity	Market Rate	Caps
Round 1	6/13/2023	\$3.15M (min)	\$1.05M (max)	Yes
Round 2	ТВА	\$2.1M (min)	\$700k (max)	Yes

Round 1 Caps (Individual)

- Contractor: \$500k
- Property Owner: \$500k

Caps will reset for the Second Round. These individual caps apply only to the Second Round:

- Contractor: \$360k
- Property Owner: \$360k

Incentive Eligibility and Definition

Customer Eligibility

• All existing residential buildings qualify. New Construction jobs are **not** eligible for TECH incentives

Building Type Definition

- <u>Single-family</u>: single family homes **and** installations at a single, homeowner occupied unit that is individually metered within larger complex
- <u>Multifamily</u>: property with 5 or more dwelling units where multiple replacements are occurring at once and installations at buildings with 4 or fewer dwelling units served by a central system
 - Campuses with multiple individual single-family homes all operated by single entity would also be considered multifamily

Installation Eligibility

- The heat pump appliance must be **replacing** an **existing non-heat pump heating source**
 - Non-heat pump can be propane, natural gas, wood burning, electric resistance or solar heated appliances
 - Heat pump to heat pump + heat pumps added to previously non-conditioned spaces do not qualify
 - Dual fuel systems are allowed. However, to qualify, the system must a 3-component AHRI tested system.

Multifamily Equity Definition

Equity communities have been defined as meeting **one** of the following criteria:

Criteria	Proof Required?	Additional Resources
In a CalEnviroScreen 4.0 Disadvantaged Community	No	https://oehha.ca.gov/calenviroscreen/sb535
Rental Multifamily property located in a hard-to-reach county	No	List of counties can be found here: <u>TECH Public</u> <u>Reporting Multifamily Incentives (techcleanca.com)</u> See next slide for list hard-to-reach counties
At least 66% of living units are <80% AMI	Yes*	Various (examples could include rent rolls, income documentation, evidence of Section 8, and/or proxy documentation of other income qualified programs such as CARE/FERA, CalFRESH, SNAP, etc.)
Deed-restricted housing	Yes*	Copy of regulatory agreement/deed restriction showing that at least 50% of the units are regulated affordable housing at <80% AMI

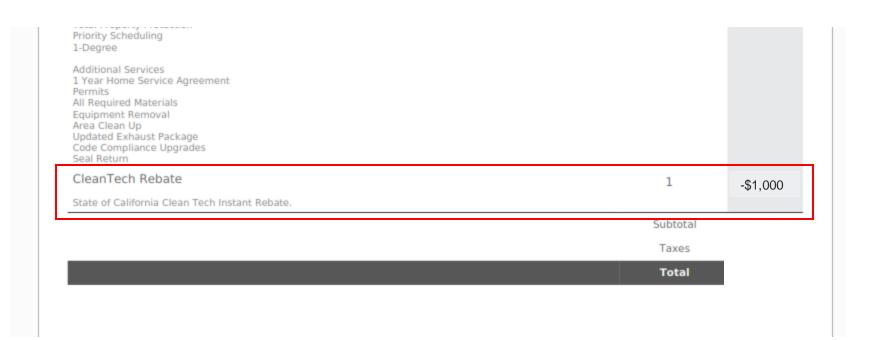
*Only required if using this criteria as the basis for meeting the multifamily equity definition

Hard-to-Reach Counties

Kings Alpine Amador Lake Butte Lassen Calaveras Madera Colusa Mariposa Mendocino Del Norte Merced Fresno Glenn Modoc Humboldt Mono Imperial Monterey Inyo Plumas Kern San Joaquin San Luis Obispo Santa Barbara Shasta Sierra Siskiyou Stanislaus Sutter Tehama Trinity Tulare Tuolumne

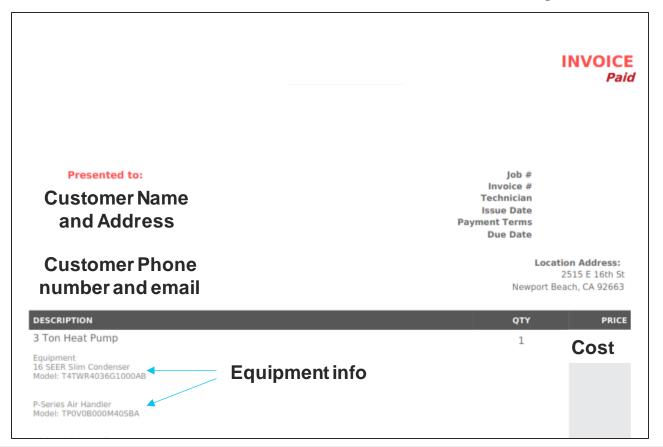
Program Rule: Incentive Pass-down

- Incentive is to be passed down 100% from contractor to consumer. Incentive can either be passed along as an **instant discount** or provided **after the contractor receives the incentive**
 - In either case, the incentive must be listed as a line item on the invoice and be paid to the contractor
 - Application will ask which method is being used for each application (instant rebate vs delayed)



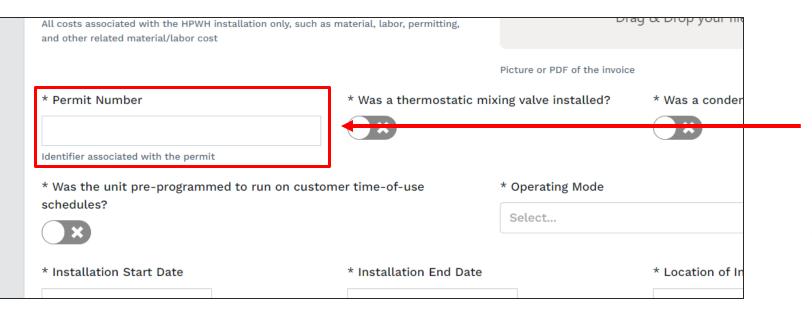
Program Rule: Invoice Requirements

- Invoice must include the customer site information and installed equipment details along with the incentive amount
- Paid invoice submitted on the claim must be the same invoice provided to your customer



Program Rule: Permits

• All jobs must be permitted- however, the application only asks for a permit number and the permit does not need to be closed at time of application submission



- Permit Number is a required field.
- Submitted permits will be spot checked against submitted CF-3R and/or with local jurisdiction to confirm validity

Program Rule: Incentive Capped At Cost

- In all cases, the available incentive is capped at the total measure cost, including parts and labor
 - Application asks for measure cost please provide only the cost associated with the individual appliance installation versus total project cost

	Dute the
* HPWH Install Cost	* Invoi
All costs associated with the HPWH installation only, such as material, labor, permitting, and other related material/labor cost	
	Picture
* Permit Number * Was a thermostatic mi	xing val



Multifamily Heat Pump HVAC Details

Incentives for Heat Pump HVAC Systems Serving Individual Apartments

Previous Space	System Type		Total Incentive Per	
Heat Source	Description	AHRI Test Standard	System	
Non-heat pump systems	Split or rooftop heat pump (ducted or ductless)	210/240	\$2,000	
All except PTHPs	PTHP, SPVHP, or unitary through the wall/ceiling heat pump	310/380, 390	\$500 (Single or two-stage compressor) \$1,000 (Variable capacity/inverter-driven)	

Eligible measures and incentives are unchanged in relaunch

Incentives for Heat Pump HVAC Systems Serving Multiple Apartments

	Previous Space Heat Source	System Type	Total Incentive Per Apartment Served
1	Non-heat pump systems	HP HVAC equipment serving multiple apartments	\$1,000

Multifamily Heat Pump HVAC Details

Incentives for Heat Pump HVAC Systems Serving Common Areas

Previous Space Heat Source	System Type	Total Incentive Per System
Non-heat pump	Split or rooftop heat pump (ducted or ductless)	\$1,800
systems	PTHP, SPVHP, or unitary through the wall/ceiling heat pump	\$300 (Single or two-stage compressor) \$800 (Variable capacity/inverter-driven)

Eligible measures and incentives are unchanged in relaunch

Multifamily Heat Pump WH Details

Incentives for Unitary Heat Pump Water Heaters

Previous Water Heater Source	HPWH Tank Size	Total Incentive Per System
Gas/Propane	< 55 gallons	\$1,400
	≥ 55 gallons	\$2,100
Electric Resistance	All	\$700

Incentives for Central Heat Pump Water Heaters

Previous Water Heater Source	HPWH Storage Volume*	Total Incentive Per System
Gas/Propane	< 17 gallons per bedroom served	\$1,200
	\geq 17 gallons per bedroom served	\$1,800

*Storage volume only includes storage volume of water that can be heated directly by the heat pump components of the plant

Eligible measures and incentives are unchanged in relaunch

Multifamily Pool or Spa Heating

Incentives for Multifamily Heat Pump Pool or Spa Heating

Previous Heater Source	System Type	Total Incentive Per System
Non-Heat Pump	Heat pump pool heating	\$2,500



Eligible measures and incentives are unchanged in relaunch

Multifamily Electrical Upgrades

Incentives for Electrical Panel Upgrades

Previous Equipment	System Type	Incentive / Apartment Receiving Electrical Upgrade
Undersized apartment electrical infrastructure that is upgraded as part of an apartment's HPWH or HP HVAC installation	Apartment panel or subpanel upgrades	\$1,400 Apartment unit must have received a TECH-funded HP HVAC and HPWH and <u>must</u> <u>be all-electric after the</u> <u>upgrade</u>

Eligible measures and

incentives are unchanged in relaunch

Equipment Requirements

Heat Pump HVAC

Multifamily Incentives — HVAC			
System Type	Previous Space Heating Source	HVAC Type	Requirements
Individual HVAC (In-Apt or Communal		Split or Packaged Rooftop/Multi- position Heat Pump (ducted or ductless)	 Meet AHRI Standard (210/240) contractor must upload documentation indicating evidence of load sizing calculations
Spaces)	Non-Heat Pump Systems	PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump	 Meet AHRI Standard (310/380, 390) contractor must upload documentation indicating evidence of load sizing calculations
Central HVAC (2+ apt)		HP HVAC equipment serving multiple apartments	 Meet AHRI Standard applicable to system type contractor must upload documentation indicating evidence of load sizing calculations



To see the PDF, visit <u>http://switchison.org/contractors/incentive-resources/</u> and click on "Qualifying Multi-Family Equipment Specifications" in the "Qualifying Products List" drop down.

Heat Pump Water Heaters

Multifamily Incentives — HPWH		
System Type	Previous Water Heating Source	Requirements
	Gas/Propane to HPWH	•240v Residential HPWHs: Multifamily requirements shall align with standard single family HPWH incentive requirements. Unless otherwise
Individual HPWH (In-Apt or Communal Spaces)	Electric Resistance to HPWH	 changed, all units must be qualified as NEEA Tier 3 or JA-13 compliant. 120v "Plug-In" Residential HPWHs: All units are eligible, regardless of NEEA tier. Thermostatic Mixing Valves are required on all HPWH systems receiving multifamily incentives. The mixing valves can either be embedded within the unit or as a separate addition.



To see the PDF, visit <u>http://switchison.org/contractors/incentive-resources/</u> and click on "Qualifying Multi-Family Equipment Specifications" in the "Qualifying Products List" drop down.

Heat Pump Water Heaters

Previous Water Heating Requirements Source	
All Non- Heat Pump Systems	 Systems are 100% electric systems. No fossil fuel-heated auxiliary systems, swing tanks, or parallel loop systems. Heat Pump equipment must be approved for use in CBECC TMVs are required on all HPWH systems receiving multifamily incentives. The TMVs can either be embedded within the unit or as a separate addition. Storage volume based only on storage tanks that are part of Central HPWH plant. Piping, expansion tanks, and other HPWH/water heating equipment that is not defined as a storage tank does not count towards storage volume calculation.
All Non- Heat Pump Systems	 100% electric systems (no natural gas or propane auxiliary systems). The system shall have a rated COP of ≥ 4.0 at 50F AT, 63% RH, and 80F WT in accordance with AHRI Standard 1160
	Water Heating Source All Non- Heat Pump Systems All Non- Heat

Specifications" in the "Qualifying Products List" drop down.

Electrical Upgrades

Multifamily Incentives — Electrical Upgrades			
System Type	Previous Equipment	Requirements	
Individual Apartment Electrical Upgrades	Undersized apartment electrical infrastructure	 Apartment Panel or Sub Panel Upgrades, Feeder Upgrades, or Service Disconnect Upgrades that is completed as part of an apartment's HPWH or HP HVAC installation Apartment unit must have received a TECH funded HP HVAC or HPWH and must be all-electric after the electrical upgrade 	



To see the PDF, visit <u>http://switchison.org/contractors/incentive-resources/</u> and click on "Qualifying Multi-Family Equipment Specifications" in the "Qualifying Products List" drop down.



TECH Contractor Enrollment







Never Enrolled?

https://switchison.cleanenergyconnection.org/ form/enrollment-form

Enrollment requirements include:

1.Active California contractor license in good standing

2.Adherence to the requirements

outlined in the Trade Professional

Participation Agreement including

insurance coverage

3.Brief program training completion

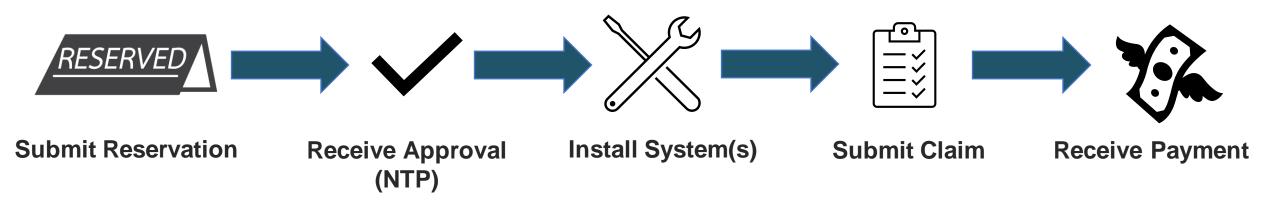
Previously Enrolled?

https://frontierenergy.formstack.com/forms/tppa

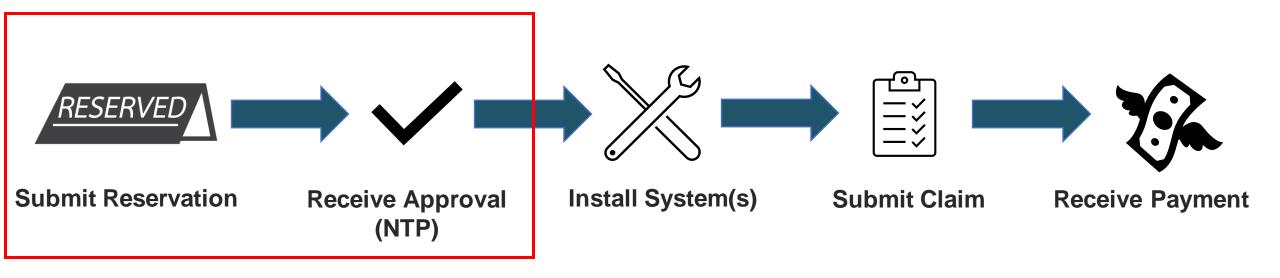
How to tell if you completed?

- 1. Check your email for a confirmation
- 2. Review your listing on CleanEnergyConnection to see if you have a TECH badge
- 3. Email <u>TECH.info@energy-solution.com</u>

Submission Process



Submission Process



Reservation Policies

- Submitted reservations are not guaranteed incentives until approved
- Project (scope of work being incentivized) should not start until reservation is approved
- Approved reservations may not be substituted with unreserved projects
- The Contractor listed on the reservation form cannot be replaced with another Contractor
 - Unless Property Owner provides documentation that existing Contractor has been removed entirely from project for justified circumstances
- Work must be completed 12 months from the date of reservation approval
 - If complexities arise, reservations may submit a request for an extension beyond 12 months
 of reservation approval date
 - Send request to TECHMF@aea.us.org at least 1 month in advance of reservation expiration date, and
 - Must provide evidence of substantial project progress, and
 - Submitting a request does not guarantee reservation will be extended
- In all instances reservations expire June 2025

Reservation Submission and Approval Process

1. Submit reservation (Contractor or Property Owner)

- New online form, no login needed, <u>not IRIS</u>
 link will be available September 6th at 12
 PM PST
 - Reservations submitted using old Reservation PDF form will not be accepted
- The Contractor or Property Owner completes and submits the online reservation form

\exists 2. Initial reservation review (AEA)

- AEA reviews submitted reservation form
 - If corrections are needed, Contractor is emailed a correction request link to update information and resubmits
 - If equity eligible, Contractor and Property Owner are emailed requesting supporting documents
- AEA completes and approves initial review

3. Request for signatures (Contractor & Property Owner)

 Digital signature request links are emailed to Contractor <u>and</u> Property Owner

4. Final reservation review and approval (ES)

 Energy Solutions completes final review and approves reservation

5. Notice to Proceed (NTP)

 Contractor and Property Owner are emailed an approved copy of signed reservation form, program terms and conditions, and equipment requirements

Create a Reservation – Property and Contractor

To submit a reservation form, go to: <u>TECH</u>
 <u>Public Reporting Multifamily Incentives</u>
 <u>(techcleanca.com)</u> (Available September 6th at 12 PM PST)

Required Information:

- Page 1
 - Property
 - Property Owner Company
 - Property Owner Contacts
 - Primary
 - Signatory (if different)
- Page 2
 - Contractor Company
 - Contractor Contacts
 - Primary
 - Signatory (if different)

Multifamily Incentive Reservation Form

TECH Multifamily Incentive Process

Step 1: Initiate process to reserve funds by completing this form.

Step 2: After form is reviewed and approved, receive reservation confirmation.

Step 3: Complete retrofit/measure installations.

Step 4: Submit an online incentive claim application

Step 5: After application is reviewed and approved, receive incentive claim check in the mail.

If you have questions about the Program or Process, contact TECHMF@aea.us.org

Property Information

Select an existing property or create a new one

Select an existing one
 Create a new one

Existing Property	
Property Street Address *	Number of Buildings*
Q	#####
Property Name *	Property City *
Placeholder	Placeholder
Property Zip Code *	Number of Dwelling Units *
######	####
Housing Type *	Occupant Status *
Placeholder	Placeholder
Property Meter Structure	
Existing Space Heating Paid By*	Proposed Space Heating Paid By*
Placeholder	Placeholder
Existing Domestic Hot Water Paid By*	Proposed Domestic Hot Water Paid By *
Placeholder	Placeholder

Create a Reservation – Equipment Scope of Work

• Page 3

- HPWH
 - Quantity
 - Total Incentive
- HP HVAC
 - Quantity
 - Total Incentive
- Electrical Upgrades
 - Quantity
 - Total Incentive
- Reservation Total
 Incentive Requested

Aultifamily	Incentive	e Reserva	tion Form
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				Save my progress and resume later Resume a previously saved f
e 3				
servation for Qualifying Equipment Scope	e of Work (Retrofit Only)			
leat Pump Water Heater (HPWH)				
Individual HPWH: In-Apt or Common Area				
Previous Water Heating Source	HPWH Tank Size	Incentive for Individual Apartment	Qty of HPWHs	Total Incentive
Electric Resistance to HPWH	All	\$700		\$0
11	1.			
Gas/Propane to HPWH	< 55 Gallons	\$1400		\$0
11				
Gas/Propane to HPWH	≥ 55 Gallons	\$2100		\$0
4				
Central HPWH				
Previous Water Heating Source	HPWH Tank Size	Incentive for Equipment serving 2+ Apartments	Qty of Apts served	Total Incentive
All Non-Heat Pump Systems	< 17 Gallons per Bedroom Served	\$1200		\$0
//	//			
All Non-Heat Pump Systems	≥ 17 Gallons per Bedroom Served	\$1800		\$0
4	4			
Pool and Spa HPWH				
Previous Water Heating Source	Pool Heater Type	Incentive for Equipment serving 2+ Apartments	Qty	Total Incentive
All Non-Heat Pump Systems	Heat Pump Pool Heating	\$2500		\$0
11	1			
INDEXT INTERNATION INTERNATIONI INTERNATION INTERNATIONI INTERNATIA INTERNATIA INTERNATIA INTERNATI INTERNATIA INTERNATIA INTERNATIA INTERNATIA INTERNATI				
		Incentive for Individual Apartment / Per		

Create a Reservation – Layered Incentives, Acknowledgement and Submission

Page 4

- Anticipated layered incentive programs
- Project notes/information
- Acknowledge
 - Terms and Conditions
 - Qualifying Equipment Requirements

• Page 5

- Review all reservation form information entered
- Confirm and submit completed reservation

Reservation confirmation and request emails will be sent from **TECHMF@aea.us.org**

• Recommend adding as a contact to avoid going to Junk folder

Multifamily Incentive Reservation Form
Page 4
Anticipated Layered Incentive Programs
Anticipated Layered Incentive Programs (please select all that apply after)
C 3C-REN
BAMBE
CAMR
Energy Smart Home
ESA-MF
- 500
Total Anticipated Layered Incentives
\$ 167890
Project Notes
Project Notes
test
Acknowledge Info
Please review, upon approval of reservation you will be required to agree to Terms and Conditions and acknowledge the qualifying equipment to ensure compliance with the Program.
Acknowledge Terms and Conditions Acknowledge Qualifying Equipments Requirement
Reservation Review and Confirmation
Please select "Review Reservation" button below to review your application responses, edit and print a copy for your records.

MPORTANT: You must select the "Confirm" button at the bottom of the next screen to complete and submit your reservation for review.

vious Page **Review Reservation**

Reservation Milestones & Check-in Schedule

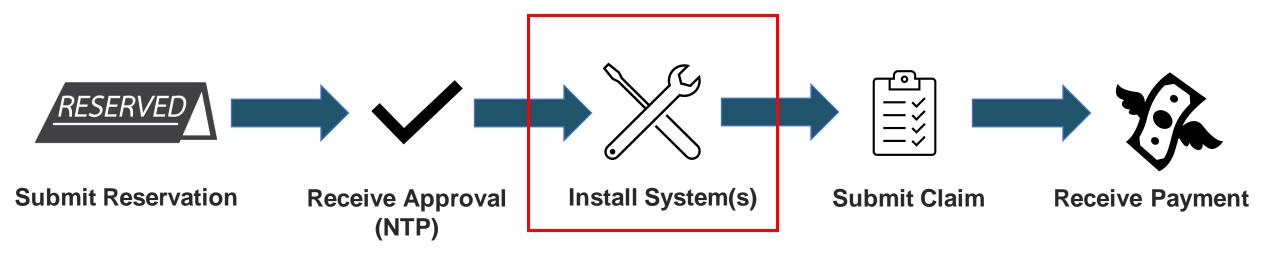
- AEA will contact approved reservations every 3 months inquiring about project status
 - If Contractor/Property Owner cannot provide required documentation within 3 weeks of milestone check-in dates listed below, reservation will be cancelled

Milestone Check-in Date (Time Since Reservation Approval Date)	Required Documentation
3 months	Proof of permit pulled or written acknowledgement project is moving forward
6 months	Proof of permit pulled (<i>if not provided at 3-month milestone check-in</i>) or equipment order documentation or installation in progress photos
9 months	Installation in progress photos (different photos from 6-month milestone check-in)

• If Contractor/Property Owner doesn't respond to milestone check-in dates listed, reservation will be cancelled

Milestone Check-in Date (Time Since Reservation Approval Date)	Number of Times Contacted	Type of Communication
3, 6 & 9 months	Once a week for 3 weeks, from milestone check-in dates	Email and phone call (Minimum of 3 emails and 3 phone calls)

Submission Process



Installation- What to keep in mind (HPWH)

- Review the HWPH required claim fields ahead of installing to make sure you note all info required for a claim
 - Existing equipment photos
 - Existing installed units/equipment (including electrical panel if applicable)
 - Nameplates (if possible)
 - Post-installation photos
 - Equipment installed (wide angle showing area around it)
 - Outdoor unit nameplates clearly showing the manufacturer, model and serial number
 - Installed TMV (close-up photo and zoomed out photo of the HPWH and TMV)
 - Electrical panel (if applicable)
 - All apartment end uses uploaded/attached as evidence for all-electric (heating, hot water, cooking, laundry dryer) (if electric panel was upgraded)
 - As-built system plumbing diagram
- All TECH incentivized jobs must be permitted
 - Permits are not required to be finalized prior to submitting claim

Installation- What to keep in mind (HP HVAC)

- Review the required HP HVAC claim fields ahead of installing to make sure you note all info required for a claim
 - Existing equipment photos
 - Existing installed units/equipment (including electrical panel if applicable)
 - Nameplates (if possible)
 - Post-installation photos
 - Equipment installed (wide angle showing area around it)
 - Outdoor unit nameplates clearly showing the manufacturer, model and serial number
 - Electrical panel (if applicable)
 - All apartment end uses uploaded/attached as evidence for all-electric (heating, hot water, cooking, laundry dryer) (if electric panel was upgraded)
 - Sizing calculations
- All TECH incentivized jobs must be permitted
 - Permits are not required to be finalized prior to submitting claim





Contractor Resources

- Contractor Knowledge Base
- TECH YouTube Channel
- Switch is On:
 - <u>TECH Contractor Resources</u>
 - TECH Training Hub
 - Incentive Finder Tool
 - Find a Contractor Listing
 - Public Reporting Site
 - Budget Report
- Program flyer:
 - TECH Multi Family Incentives Flyer





Your Account Manager

AM	Region	Contact
Sam Khamseh	Bay Area Support, Orange County	skhamseh@frontierenergy.com
Katie Nash	Greater Los Angeles, Central Coast	knash@frontierenergy.com
Cassidy Becker	Central Valley, Sacramento Vall ey	cbecker@frontierenergy.com
Rene Franco	San Diego area, Sierra Desert	rfranco@frontierenergy.com
Margit Barot	Northern CA	mbarot@frontierenergy.com
Thomas Godfrey	Bay Area 9 Counties	tgodfrey@frontierenergy.com

Contact Us

General multifamily questions: TECHMF@aea.us.org

For contractor support: TECH.contractor@energy-solution.com

For claims/IRIS support: TECH.incentives@energy-solution.com

Resources available at:

- https://techcleanca.com/
- https://frontierenergy-tech.my.site.com/contractorsupport/s/
- https://switchison.org/contractors/tech-clean-california/



