

Multifamily Incentive Reservation Form



Section 1: Multifamily Property Information

Property Name Property Address, City, ZIP Number of Dwelling Units

Property Owner's Parent/Portfolio Co

Property Owner Primary Contact Information:

Contact Name Email Address Phone Number

Housing Type:

Market Rate	Partially Subsidized
Subsidized Affordable Housing	Low-Income Affordable Housing
Natural Occurring Affordable Housing (NOAH)	(see definition on page 4)

Section 2: Contractor Information (TECH Participating Trade Professional)

Contractor Company Contractor State License Board (CSLB) Number

Contractor Primary Contact Information:

Contact Name Email Address Phone Number

Section 3: Property Meter Structure

Existing space heating equipment utilities paid for by:	Owner	Tenant
Proposed space heating equipment utilities paid for by:	Owner	Tenant
Existing domestic hot water equipment utilities paid for by:	Owner	Tenant
Proposed domestic hot water equipment utilities paid for by:	Owner	Tenant

Section 4: Anticipated Layered Incentive Programs

List all additional incentives. Include program name, incentive amount, and total (if known). Separate programs by commas.

Section 5: Reservation for Qualifying Equipment Scope of Work (Retrofit Only)

Refer to Appendix A for full measure requirements.

5a. Heat Pump Water Heater (HPWH)						
Equipment Type	Previous WH Fuel Type	HPWH Capacity	Incentive per Unit		Qty	Total Incentive
			Unit Type	Incentive		
Unitary HPWH (In-Apartment or Common Areas)	Natural Gas/ Propane	<55 gallons	Market Rate	-		
			Low Income	\$1,000		
		>55 gallons	Market Rate	-		
			Low Income	\$1,000		
Equipment Type	Previous WH Fuel Type	HPWH Capacity (per bedroom)	Incentive per Apartment Served		Qty	Total Incentive
			Unit Type	Incentive		
Central HPWH (Serving 2+ apartments)	Natural Gas/ Propane	<17 gallons	Market Rate	-		
			Low Income	\$1,000		
		≥17 gallons	Market Rate	-		
			Low Income	\$1,000		
5b. HVAC Heat Pumps						
Serving Individual Apartments	Equipment Type	Equipment Subcategory	Incentive per Unit		Qty	Total Incentive
			Unit Type	Incentive		
	Split and Rooftop HP	All	Market Rate	\$3,000		
			Low Income	\$4,000		
	PTHP, SPVHP and Unitary Through-the-Wall HP	1- and 2-stage	Market Rate	\$750		
			Low Income	\$1,000		
		Variable capacity/ inverter driven	Market Rate	\$1,500		
			Low Income	\$2,000		
Serving 2+ Apartments	Equipment Type	Equipment Subcategory	Incentive per Apartment Served		Qty	Total Incentive
			Unit Type	Incentive		
	All HP HVAC	All	Market Rate	\$1,500		
			Low Income	\$2,000		
Serving Common Areas	Equipment Type	Equipment Subcategory	Incentive per Unit		Qty	Total Incentive
			Unit Type	Incentive		
	Split and Rooftop HP	All	Market Rate	\$2,700		
			Low Income	\$3,600		
	PTHP, SPVHP and Unitary Through-the-Wall HP	1- and 2-stage	Market Rate	\$450		
			Low Income	\$600		
		Variable capacity/ inverter driven	Market Rate	\$1,200		
			Low Income	\$1,600		
5c. Electrical Upgrades						
Description			Incentive per Panel		Qty	Total Incentive
			Unit Type	Incentive		
Individual apartment electrical upgrades that increase panel capacity to fully electrify all unit end-uses			Market Rate	\$2,000		
			Low Income	\$2,800		
Total Electrify Your Home Incentive Reserved:						

Section 6: Miscellaneous Project Notes

Section 7: Signatures

By signing below, Property Owner and Contractor ("Reservation Parties") agree to use best efforts to implement each Qualifying Equipment listed in the Reserved Scope of Work above, and hereby agree to be bound by the Electrify Your Home Standard Multifamily Incentive Reservation Terms and Conditions, attached and incorporated herein. Reservation Parties acknowledge that changes to the work scope may result in incentive changes or disqualification, and that measures must meet Electrify Your Home Qualifying Equipment Requirements as outlined in Appendix A. Reservation Parties acknowledge and agree that Electrify Your Home incentives will be paid to the Electrify Your Home Participating Trade Professional ("Contractor") completing the Electrify Your Home Incentive Application after the completion of Qualifying Equipment installation, in accordance with the Electrify Your Home Trade Professional Participation Agreement executed by Contractor.

Property Owner

Primary Contact: _____
PRINT NAME SIGNATURE DATE

Contractor

Primary Contact: _____
PRINT NAME SIGNATURE DATE

OFFICE USE
ONLY

EYH INCENTIVE MANAGER NAME SIGNATURE DATE

Next Steps:

1. Coordinate with Electrify Your Home Clean California representatives as needed to complete reservation form
2. Once completed and signed by Property Owner Primary Contact and Participating Contractor Primary Contact, submit completed reservation form to techmf@aea.us.org.
3. Electrify Your Home Incentive Manager will review the reservation form and either approve or respond to all parties with relevant comments needing to be addressed prior to approval.
4. Once approved, the Electrify Your Home Incentive Manager will send countersigned reservation form to all parties.

Multifamily Incentive Reservation Terms & Conditions

Program Description

The Electrify Your Home Program (hereafter referred to as "Program") supports the installation of Heat Pump Water Heaters ("HPWH") and HVAC Heat Pumps ("HP") in Central Coast Community Energy's ("CCCE" or "Program Administrator") service territory. The Program provides incentives to Participating Trade Professionals for selling and installing qualifying HPWHs and HPs to residential customers residing in a zip code served by CCCE. The Program is a CCCE partnership with the TECH Clean California initiative designed to drive the market adoption of HPWHs and HVAC heat pumps. The Program participants enrolled in TECH Clean California are automatically eligible for the Program incentives within CCCE service area.

Cohen Ventures, Inc. dba Energy Solutions (hereinafter referred to as "Energy Solutions" or "Program Implementer") is implementing the program on behalf of CCCE. To participate in the Program Participating Trade Professionals are required to sign the TECH Trade Professional Participation Agreement agreeing to the terms and conditions of participation.

In order for Participating Trade Professionals and Multifamily Property Owners to reserve, and for Participating Trade Professionals to receive Incentives for equipment installed in Multifamily Properties, both parties (the "Reservation Parties") are required to sign this Standard Multifamily Incentive Reservation Form (hereafter referred to as "Reservation Form") and are agreeing to the Reservation Form terms and conditions set forth herein (the "Terms and Conditions").

Reservation Term

The incentive reservations listed in the Reservation Form ("Incentive Reservation(s)" shall expire up to twelve (12) months after the Final Reservation Form Approval Date, resulting in a loss of incentive reservation position unless an extension is granted in writing by the Program Implementer. If complexities of the project require more time, the Multifamily Property Owner or Participating Trade Professional must notify Energy Solutions in writing with a proposed schedule and request an extension. Pending incentive fund availability, Reservation Forms needing to be maintained beyond September 30, 2024 may require a replacement Reservation Form to be executed by the Reservation Parties and approval by the Energy Solutions TECH MF Incentive Manager or a representative of CCCE. Such replacement Reservation Form may be subject to updated program terms, incentive amounts, and requirements.

The Program may be modified or terminated by Energy Solutions or CCCE at any time. Incentive amounts are subject to change without notice. If such situations arise, good faith efforts will be made by Energy Solutions to honor all Incentive commitments made in the approved Reservation Form, provided Qualifying Equipment has been installed by the Participating Trade Professional within the timeline as specified in the Reservation Form and associated Terms and Conditions.

Definitions

When used in these Terms and Conditions, the following terms, with initial capitalization, have the meanings specified below:

"Final Reservation Approval Date" refers to the date the reservation form was approved and signed by the Energy Solutions TECH MF Incentive Manager.

"Multifamily Property" or "Property" means eligible multifamily property with five or more dwelling units that is located in a zip code served by a CCCE that has available Incentives being offered.

"Multifamily Property Owner" refers to the primary owner and decision maker of the multifamily property or portfolio of multifamily properties.

"Low-Income Affordable Housing" refers to 66% of units are equal to or less than 80% AMI OR within a disadvantaged community OR if building resides in low-income/DAC county."

"Participating Trade Professional" means an entity that participates in any Program. CCCE, at its sole discretion, reserves the right to review and approve if an organization is a Participating Trade Professional.

“Qualifying Equipment” means that the equipment and systems that are eligible for Incentives.

“Incentive” means financial reimbursement (e.g., incentives) to Participating Trade Professional paid pursuant to the TECH Trade Professional Participation Agreement to encourage the installation of HPs and HPWHs. The Incentive for each Qualifying Equipment will be set forth on the TECH Qualifying Equipment Requirements and Incentive Amounts contained herein, as such may be modified on future Reservation Forms and their associated Terms and Conditions.

“Incentive Application” refers to the form Participating Trade Professional must complete and submit to Energy Solutions in order to request reimbursement of Incentives for Qualifying Equipment. The process for submitting an Incentive Application is included in Exhibit A of the TECH Trade Professional Participation Agreement.

“Incentive Cap” refers to the maximum available financial reimbursement a Trade Professional or Multifamily Property Owner’s Properties can obtain across all multifamily participations in the Program.

“TECH Trade Professional Participation Agreement” refers to the legally binding enrollment document that the participating Trade Professional must agree to and sign prior to being enrolled in the Program.

Terms and Conditions

In order for a trade professional to be eligible for Incentives and reserve funds under this Agreement, they must be a Participating Trade Professional installing TECH reserved measures, have successfully completed TECH enrollment requirements outlined in the TECH Trade Professional Participation Agreement, and have executed and are in compliance with the TECH Trade Professional Participation Agreement under the Program. Multifamily Property Owner acknowledges that any trade professional who does not comply with the aforementioned TECH enrollment requirements will not be eligible for incentives. The Trade Professional listed on the Reservation Form must have an executed TECH Trade Professional Participation Agreement prior to the Final Reservation Approval Date.

The amounts of the Incentives for which Qualifying Equipment and Properties are eligible are set forth in the Reservation Form. Variances in equipment quantities, efficiencies, types, or other scope details that occur after the Reservation Form has been signed may result in a decrease in the final Incentive amount. If variances in work scope details occurring after the Reservation Form has been signed would result in an increase in the final Incentive amount, an updated Reservation Form must be submitted and approved by Energy Solutions to authorize an increase in Incentive funds being reserved. Final Incentive amounts will be based on the submission of a completed Participating Trade Professional Incentive Application, as outlined in the TECH Trade Professional Participation Agreement, after the completion of the Qualifying Equipment installation(s). The final Incentive amount, including other layered incentives, cannot exceed total cost of the Qualifying Equipment.

Participating Trade Professional may receive Incentives for approved Qualifying Equipment installed on multiple Multifamily Properties but shall be limited to an aggregate total of \$100,000 in Incentives (“Incentive Cap”) across all Properties and Qualifying Equipment. Multifamily Property Owner may have multiple Properties installing Qualifying Equipment but shall be limited to an aggregate total Incentive Cap of \$100,000 in Incentives across all Properties and Qualifying Equipment. Incentive participation caps are subject to modification on an ongoing basis.

All equipment and installation requirements shall comply with Qualifying Equipment requirements as detailed in the “Electrify Your Home Multifamily Qualifying Equipment” document attached to the Reservation Form in Appendix A. Non-compliance with requirements may result in disqualification or reduction of Incentives. The Reservation Parties further acknowledge and agree that Energy Solutions or CCCE reserve the right to reject a Reservation Form for any reason, at any time, and that upon rejection, Energy Solutions and CCCE shall have no further obligation to Reservation Parties as it relates to the Incentive amounts outlined on the executed and approved Reservation Form.

Energy Solutions may use specific information including Property name, Participating Trade Professional name(s), Property addresses, planned Qualifying Equipment, Incentive reservation amounts, and timeline projections including but not limited to the following purposes: to fulfill reporting requirements to CCCE, for coordination with other programs providing leveraged funds, and for conveying the status of project activity to the local government jurisdictions in which the project is located. Project information may be presented in aggregate level with other Properties in the Program, as part of a list of projects, or with Multifamily Property Owner and Participating Trade Professional’s consent in a project-specific case study.

Energy Solutions and CCCE are not responsible for any taxes which may be imposed on the Multifamily Property Owner or Participating Trade Professional as a result of Qualifying Equipment installed under the Program or any Incentive payments.

Energy Solutions and CCCE make no representations or warranties, expressed or implied, including but not limited to warranties of merchantability and fitness for a particular purpose. Neither the Program Implementer nor the CCCE represents or guarantees that installation of the Qualifying Equipment purchased or installed pursuant to the Program will result in energy cost savings. In addition to the other requirements set forth herein, in order to receive an Incentive through the Program, products must meet Qualifying Equipment Requirements.

Multifamily Property Owner and Participating Trade Professional are solely responsible for design and installation of the Qualifying Equipment. Energy Solutions' or CCCE's review of the design, construction, operation or maintenance of the Qualifying Equipment, does not constitute an examination or representation of any kind regarding the Qualifying Equipment, including their economic or technical feasibility, operational capability, or reliability. Nothing herein, or in the Program, shall cause Participating Trade Professional to be an agent of or joint venturer with CCCE or Energy Solutions for any purpose, and the Participating Trade Professional shall have no authority to take any action or make any representation on behalf of the CCCE or Energy Solutions.

The Reservation Parties agrees to jointly and severally defend, indemnify and hold harmless the Program Implementer and CCCE (including their respective affiliates, officers, directors, employees, regional representatives, agents, successors or assigns) (each an "Indemnified Party"), from and against any and all claims, demands, liabilities, losses, or causes of action (including, without limitation, court costs and reasonable attorney's fees) (collectively, "Losses") which arise out of or are connected with any of this Reservation Form, the Program or the Qualifying Equipment the installation and use of the Qualifying Equipment, or any of Participating Professional's representations or warranties; provided, however, that the foregoing indemnification obligation will not apply to the extent such Losses are caused solely from the active negligence of the Indemnified Party.

The Multifamily Property Owner and Participating Trade Professional are solely responsible for the economic and technical feasibility, operational capability, and reliability of the Qualifying Equipment. Neither Energy Solutions nor CCCE shall have any responsibility or liability for injury to or death of any person or damage to any property in connection with the Reservation Parties' participation in including the installation or use of the Qualifying Equipment. In no event will Energy Solutions or CCCE be liable for any incidental, special or consequential damages. Participation is voluntary and there is no obligation to purchase any specific product or service.

All work must be in full compliance with the requirements of applicable laws, rules and regulations of authorities having governmental and regulatory jurisdiction.

The validity, construction, performance and application of these Terms and Conditions are governed by California law, and any lawsuit relating to this Participation Agreement must be brought exclusively in the California Superior Court for Alameda County, California.

In any action to enforce or interpret this Agreement the prevailing party shall be entitled to recover its reasonable attorney and expert fees.

Time is expressly declared of the essence herein.

Appendix A:

CCCE Electrify Your Home Qualifying Equipment for Multifamily Properties

Multifamily Incentives — HPWH			
System Type	Previous Water Heating Source	Requirements	
Individual HPWH (In-Apartment or Common Areas)	Gas/Propane to HPWH	<ul style="list-style-type: none"> • 240v Residential HPWHs: Multifamily requirements shall align with standard single family HPWH incentive requirements. Unless otherwise 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. 	
Central HPWH	All non-heat pump systems	<ul style="list-style-type: none"> • Systems are 100% electric systems. No fossil fuel-heated auxiliary systems, swing tanks, or parallel loop systems. • For reservations signed on or after July 1, 2022, qualifying Central HPWH systems must be listed on the QPL in accordance with the NEEA v8 Advanced Water Heating Specification. Reservations approved prior to July 1, 2022 using the equipment qualification versions in effect at that time shall be honored. • 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. 	

Multifamily Incentives — HVAC			
System Type	Previous Space Heating Source	HVAC Type	Requirements
Individual HVAC (In-Apartment or Common Areas)	All non-heat pump systems	Split or Rooftop Heat Pump (ducted or ductless)	<ul style="list-style-type: none"> • Meets AHRI Standard (210/240) • Contractor must upload documentation indicating evidence of load sizing calculations
		PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump	<ul style="list-style-type: none"> • Meets AHRI Standard (310/380, 390) • Contractor must upload documentation indicating evidence of load sizing calculations
Central HVAC (serving 2+ apartments)	All non-heat pump systems	HP HVAC equipment serving multiple apartments	<ul style="list-style-type: none"> • Meet AHRI Standard applicable to system type • Contractor must upload documentation indicating evidence of load sizing calculations

Multifamily Incentives — Electrical Upgrades		
System Type	Previous Equipment	Requirements
Individual Apartment Electrical Upgrades	Undersized apartment electrical infrastructure	<ul style="list-style-type: none"> • 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 the new panel upgrades should be sized so that the apartment can go all-electric in the future without further upgrades.