

Multifamily Incentive Reservation Form

Section 1: Multifamily Property Information

Property Name	Property Address, City, Zip	Number of Dwelling Units
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Property Owner Parent/Portfolio Company

Property Owner Primary Contact Name

Property Owner Primary Contact Email

Property Owner Primary Contact Phone

Housing Type:

Subsidized Affordable Housing

Market Rate

Natural Occurring Affordable Housing (NOAH)

Partially Subsidized

Section 2: Contractor Information (TECH Participating Trade Professional)

Contractor Company

Contractor State License Board (CSLB) Number

Contractor Primary Contact Name

Contractor Primary Contact Email

Contractor Primary Contact Phone

Section 3: Property Meter Structure

Existing Space Heating Equipment Utilities Paid By	Owner	Tenant
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Proposed Space Heating Equipment Utilities Paid By	Owner	Tenant
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Existing Domestic Hot Water Equipment Utilities Paid By	Owner	Tenant
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Proposed Domestic Hot Water Equipment Utilities Paid By	Owner	Tenant
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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 measure requirements

5a. Heat Pump Water Heater (HPWH)

System Type	Previous Water Heating Source	HPWH Tank Size	Incentive for Individual Apartment	Qty	Total Incentive
			Per Equipment		
Individual HPWH (In-Apartment or Communal Spaces)	Gas/Propane to HPWH	< 55 Gallons	\$1,400		
		≥ 55 Gallons	\$2,100		
	Electric Resistance to HPWH	All	\$700		
System Type	Previous Water Heating Source	HPWH Tank Size	Incentive for Equipment serving 2+ Apartments	Qty	Total Incentive
			Per Apartment Served		
Central HPWH	All Non-Heat Pump Systems	< 17 Gallons per Bedroom Served	\$1,200		
		≥ 17 Gallons per Bedroom Served	\$1,800		
Pool or Spa Heating		Heat Pump Pool Heating	\$2,500 / equipment		

5b. HVAC Heat Pumps

System Type	Previous Space Heating Source	HVAC Type	Incentive for Individual Apartment	Qty	Total Incentive
			Per Compressor		
Individual Apartment HVAC	Non-Heat Pump Systems	Split or Packaged Rooftop/ Multi-position Heat Pump (Ducted or Ductless)	\$2,000		
		PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump	\$500 (Single or Two Stage Compressor)		
			\$1,000 (Variable Capacity/Inverter Driven)		
System Type	Previous Space Heating Source	HVAC Type	Incentive for Equipment serving 2+ Apartments	Qty	Total Incentive
			Per Apartment Served		
Central HVAC (2+ Apartments)	Non-Heat Pump Systems	HP HVAC equipment serving multiple apts	\$1,000		

5b. HVAC Heat Pumps, continued					
System Type	Previous Space Heating Source	HVAC Type	Incentive per Compressor	Qty	Total Incentive
Communal Area (Non-Apartment) HVAC	Non-Heat Pump Systems	Split or Packaged Rooftop/ Multi-position Heat Pump (Ducted or Ductless)	\$1,800		
		PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump	\$300 Single Stage or Two Stage Compressor)		
			\$800 (Variable Capacity / Inverter Driven)		
5c. Electrical Upgrades					
System Type	Previous Equipment	Upgrade Type	TECH Incentive (per Apartment Receiving Electrical Upgrade)	Qty	Total Incentive
Individual Apartment Electrical Upgrades	Undersized apartment electrical infrastructure that is upgraded as part of an apartment's HPWH or HP HVAC installation	Apartment Panel or Sub Panel Upgrades, Feeder Upgrades, or Service Disconnect Upgrades. <i>Apartment must be all-electric post retrofit.</i>	\$1,400		
Total TECH Standard Incentive Reserved					

Section 6: Miscellaneous Project Notes

Section 7: TECH Pilot Information

Is this project participating in an approved TECH pilot? YES NO

TECH Pilot Work Scope:

Total TECH Pilot Incentive Reserved (if applicable)

Section 8: 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 TECH 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 TECH Qualifying Equipment Requirements as outlined in Appendix A. Reservation Parties acknowledge and agree that TECH incentives will be paid to the TECH Participating Trade Professional (“Contractor”) completing the TECH Incentive Application after the completion of Qualifying Equipment installation, in accordance with the TECH Trade Professional Participation Agreement executed by Contractor.

Party	Printed Name	Signature	Date
Property Owner Primary Contact			
Participating Contractor Primary Contact			
For office use only			
<i>Final signature authorizing approval and start date of 12-month expiration (subject to extension upon approval)</i>			
TECH Incentive Manager			

Next Steps

1. Coordinate with TECH Clean California representatives to complete reservation form, as needed
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. TECH 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 TECH Incentive Manager will send countersigned reservation form to all parties

TECH Clean California Multifamily Incentive Reservation Form Terms and Conditions

TECH Clean California Description

The TECH Clean California initiative (hereafter referred to as “TECH” or “Program”) supports the installation of Heat Pump Water Heaters (“HPWH”) and HVAC Heat Pumps (“HP”) in California Gas Corporation Territory. TECH provides incentives to Participating Trade Professionals for selling and installing qualifying HPWHs and HPs to residential customers residing in a zip code served by a California Gas Corporation.

Cohen Ventures, Inc. dba Energy Solutions (hereinafter referred to as “Energy Solutions” or “Program Implementer”) is implementing the program on behalf of The California Public Utilities Commission (“CPUC”). To participate in TECH, Participating Trade Professionals are required to sign a 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 TECH 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 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. In all instances, the Reservation Form shall expire on December 31, 2023. Pending incentive fund availability, Reservation Forms needing to be maintained beyond December 31, 2023, shall require a replacement Reservation Form to be executed by the Reservation Parties and approval by the Energy Solutions TECH MF Incentive Manager. 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 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.

“Gas Corporation” refers to any gas investor-owned utility (“IOU”) active within the State of California. The gas IOUs within California include Pacific Gas & Electric (“PG&E”), Southern California Gas (“SoCal Gas”), San Diego Gas & Electric (“SDG&E”), Southwest Gas (“SW Gas”).

“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.

“Multifamily Property” or “Property” means eligible multifamily property with five or more dwelling units that is located in a zip code served by a Gas Corporation 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.

“Participating Trade Professional” means an entity that participates in any TECH Initiative program. The CPUC, 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.

“TECH Incentive” or “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.

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

“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 TECH 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 TECH Incentives for approved Qualifying Equipment installed on multiple Multifamily Properties but shall be limited to an aggregate total of \$3,000,000 in TECH Incentives (“TECH Incentive Cap”) across all Properties and Qualifying Equipment. Multifamily Property Owner may have multiple Properties installing TECH Qualifying Equipment but shall be limited to an aggregate total TECH Incentive Cap of \$3,000,000 in TECH Incentives across all Properties and Qualifying Equipment. TECH Incentive participation caps are subject to modification on an ongoing basis.

All equipment and installation requirements shall comply with TECH Qualifying Equipment requirements as detailed in the “TECH Clean California Initiative 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 CPUC reserve the right to reject a Reservation Form for any reason, at any time, and that upon rejection, Energy Solutions and CPUC 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 SCE and/or the CPUC, 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 the CPUC 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 TECH or any Tech Incentive payments.

Energy Solutions and CPUC 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 CPUC represents or guarantees that installation of the Qualifying Equipment purchased or installed pursuant to TECH will result in energy cost savings. In addition to the other requirements set forth herein, in order to receive an Incentive through TECH, products must meet TECH Qualifying Equipment requirements.

Multifamily Property Owner and Participating Trade Professional are solely responsible for design and installation of the Qualifying Equipment. Energy Solutions' or CPUC'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 CPUC 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 CPUC or Energy Solutions.

The Reservation Parties agrees to jointly and severally defend, indemnify and hold harmless the Program Implementer and CPUC (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 CPUC 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 TECH including the installation or use of the Qualifying Equipment. In no event will Energy Solutions or the CPUC be liable for any incidental, special or consequential damages. Participation in TECH 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. TECH Clean California Initiative Multifamily Qualifying Equipment

Multifamily Incentives — HPWH		
System Type	Previous Water Heating Source	Requirements
Individual HPWH (In-Apt or Communal Spaces)	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.
	Electric Resistance to HPWH	
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.
Pool or Spa Heating	All Non- Heat Pump Systems	<ul style="list-style-type: none"> ▪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

Multifamily Incentives — HVAC			
System Type	Previous Space Heating Source	HVAC Type	Requirements
Individual HVAC (In-Apt or Communal Spaces)	Non-Heat Pump Systems	Split or Rooftop Heat Pump (ducted or ductless)	<ul style="list-style-type: none"> •Meet 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"> •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	<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 must be all-electric after the electrical upgrade