

## COMMUNITY ASSISTANCE RESOURCES FOR ENERGY SAVINGS PROGRAM GUIDELINES

**OBJECTIVE:** Shelby Energy Cooperative's Community Assistance Resources for Energy Savings ("CARES") Program provides an incentive for eligible end-use cooperative members ("end-use members") to enhance the weatherization and energy efficiency services provided by the Kentucky Community Action Agency ("CAA") network of not-for-profit community action agencies. On behalf of the end-use member, Shelby Energy Cooperative will pass along an EKPC-provided incentive to the CAA. Shelby Energy Cooperative's program has two primary objectives. First, the EKPC-provided incentive, passed along by Shelby Energy Cooperative to the CAA, will enable the CAA to accomplish additional energy efficiency improvements in each home. Second, this incentive will assist the CAA in weatherizing more homes.

**AVAILABILITY:** This program is available to end-use members who qualify for weatherization and energy efficiency services through their local CAA in all service territories served by Shelby Energy Cooperative.

**TERM:** This is an ongoing program.

**ELIGIBILITY:** TYPE OF HOMES  
Two types of homes are eligible for incentives:

Heat Pump-Eligible Homes (Maximum incentive per household of \$2,000)

- Homes that utilize electricity as the primary source of heat (or that switch from wood as its primary source of heat to an electric furnace)
- Single family and multi-family individually metered residential dwellings

Heat Pump-Ineligible Homes (Maximum incentive per household of \$750)

- Homes that do not utilize electricity as the primary source of heat but cool the home with central or window unit air conditioners. Each Heat Pump-Ineligible home must have electric water heating and use an average of 500 kWh monthly from November to March.
- Single family and multi-family individually metered residential dwellings

HOMEOWNER QUALIFICATIONS

- A participant must be an end-use member of Shelby Energy Cooperative
- A participant must qualify for weatherization and energy efficiency services according to the guidelines of the U.S. Department of Energy's ("DOE") Weatherization Assistance Program administered by the local CAA. Household income cannot exceed the designated poverty guidelines administered by the CAA.

## **PROGRAM DESCRIPTION:**

### **HEAT PUMP ELIGIBLE HOMES**

Shelby Energy Cooperative's CARES Heat Pump-Eligible Program supplements the weatherization and energy efficiency services provided through Kentucky's CAAs. Funding for this program is provided through the Kentucky Community Action Agency's network of not-for-profit CAAs. Shelby Energy Cooperative's CARES Program will reimburse a CAAs' energy efficiency efforts at the rates detailed below. The maximum incentive possible per household is \$2,000. The \$2,000 maximum can be reached by using any combination of the following improvements not to exceed their individual maximums:

- **HEAT PUMP:**
  - Upgrading from low-efficiency electric heat source to a heat pump will be reimbursed at a rate of 100% of the total incremental cost (material + labor) up to a maximum of \$2,000. Incremental cost is the additional cost of upgrading from a low-efficiency electric heat source to a heat pump above and beyond any costs associated with the electric furnace. Existing heat source must be electric to qualify.
  
- **WEATHERIZATION IMPROVEMENTS:**
  - Any of the following weatherization improvements made to the home will be reimbursed at a rate of 50% of a CAAs' cost (material + labor), up to a maximum of \$1,000:
    - Insulation
    - Air sealing
    - Duct sealing, insulating, and repair
    - Water heater blanket
  
- **PROHIBITED MEASURES:**
  - Health and safety measures completed at a home do not qualify for the incentive
  
- **HEALTH CONCERNS:**
  - Weatherization work must adhere to guidelines as set forth by Kentucky Housing Corporation's state weatherization program, all DOE standards, and American Society of Heating, Refrigerating, and Air Conditioning Engineer's minimum-required ventilation standards as required by DOE. Homes containing a fireplace/woodstove or attached garage are also required to be combustion safety tested. All homes containing a combustion appliance, a fireplace/woodstove, or an attached garage are required by Kentucky Housing's state weatherization program to have a carbon monoxide detector as required by the state program when weatherization work is performed.

- **DOCUMENTATION:**

For a CAA to receive the CARES program incentives detailed above, the CAA must provide invoicing on a monthly basis with the following information for each requested incentive:

1. A completed CAA weatherization program data collection form.
2. A detailed invoice for the work completed at a home. The invoice must include the following:
  - a. Homeowner name and address
  - b. Homeowner co-op meter #
  - c. Unit price of each improvement
  - d. Cost sharing details for each measure
  - e. Detail of each improvement made
  - f. Total amount spent on residence
  - g. Incentive amount requested per improvement
  - h. For heat pumps, a copy of the Air-Conditioning, Heating, and Refrigeration Institute ("AHRI") certificate for the heat pump that includes Model # and Serial # for the indoor coil and outside unit, SEER rating, HSPF rating, and Auxiliary heat (kW)
  - i. National Energy Audit Tool ("NEAT")/ Manufactured Home Energy Audit ("MHEA") recommended measures printout stating the total Btuhs saved at that home

### **HEAT PUMP INELIGIBLE HOMES**

Shelby Energy Cooperative's CARES Heat Pump-Ineligible program supplements the weatherization and energy efficiency services provided through Kentucky's CAAs. Heat pump-ineligible homes are defined as homes that utilize electricity to cool their home but rely on other fuels as their primary heat source. Heat pump ineligible homes must have electric water heating and use an average of 500 kWh monthly from November to March. Funding for this program is provided through the Kentucky Community Action network of not-for-profit CAAs. Shelby Energy Cooperative's CARES program will reimburse a CAAs' energy efficiency efforts at the rates detailed below. The maximum incentive possible per household is \$750. The \$750 maximum can be reached by using any combination of the following improvements not to exceed the maximum:

- **WEATHERIZATION IMPROVEMENTS:**

Any of the following weatherization improvements made to the home will be reimbursed at a rate of 25% of the CAA's cost (material + labor) up to a maximum of \$750:

- Insulation
- Air sealing
- Duct sealing, insulating, and repair
- Water heater blanket

- **PROHIBITED MEASURES:**
  - Health and safety measures completed at a home do not qualify for the incentive
  
- **DOCUMENTATION:**

For a CAA to receive the CARES program incentives detailed above, the CAA must provide invoicing on a monthly basis with the following information for each requested incentive:

  1. A completed CAA weatherization program data collection form.
  2. A detailed invoice for the work completed at that home. The invoice must include the following:
    - a. Homeowner name and address
    - b. Homeowner co-op meter #
    - c. Unit price of each improvement
    - d. Cost sharing details for each measure
    - e. Detail of each improvement made
    - f. Total amount spent on residence
    - g. Incentive amount requested per improvement
    - h. 8.6 NEAT/MHEA recommended measures printout stating the total Btuhs saved at that home

**QUALITY ASSURANCE:**

Shelby Energy Cooperative will randomly sample a CAAs' improvements at a rate of 1 in every 10 homes. Quality assurance sampling will include an air leakage test and visual inspection of the home.

**EXCLUSIONS:**

End-use members who participate in the CARES program are not eligible for participation in any other Shelby Energy Cooperative heat pump, duct sealing, or weatherization incentive program for 15 years from the date of improvements.