



The Comprehensive Multifamily Incentive (CoMFI) Program provides multifamily property owners and managers energy efficient solutions to help reduce energy usage and costs. CoMFI offers no-cost energy audits, property-specific energy reports, and incentive reservations for qualifying whole-building retrofits.

HOW THE PROGRAM WORKS

1. APPLY FOR THE PROGRAM

Submit this application form to express interest in participating in the CoMFI program. This document also allows program personnel to visit the property.

2. CONDUCT A PROPERTY ENERGY ASSESSMENT

A program representative will conduct a no-cost energy assessment to identify potential energy efficiency upgrades for your building's existing natural gas equipment and related systems.

3. SELECT AN INSTALLATION CONTRACTOR

Select a qualified, licensed contractor to perform the installation of your energy efficiency project. The program will provide a list of licensed contractors for customers that need assistance selecting a qualified contractor.

4. RESERVE YOUR ENERGY EFFICIENCY INCENTIVE

Once a scope of work that meets program requirements has been selected and a contractor proposal has been received by the program, you will be provided with a reservation form listing the scope of work. The property owner or authorized agent will need to sign and return the reservation form to reserve funds for their project.

5. NOTICE TO PROCEED

Once the project funds have been reserved, you will be provided with a Notice to Proceed. By signing and returning the Notice to Proceed to program representatives, you will receive approval to commence the scope of work specified in the reservation form.

6. PROJECT COMPLETION

A final verification of the installed equipment will be conducted to ensure consistency with the scope of work listed in the reservation form. Program representatives will work with the customer and contractor to obtain the necessary closeout documents. Once the submitted documents have been reviewed and approved, the incentive will be disbursed.

FOR MORE INFORMATION

Contact the CoMFI team today to receive a comprehensive overview of the many energy efficiency solutions available for multifamily properties.

P: 888-681-7797 | E: CoMFI@rhainc.com



Richard Heath & Associates, Inc. is a SoCalGas authorized contractor responsible for implementing this program through 5/1/2026.

PROGRAM ELIGIBILITY REQUIREMENTS

- Natural gas service must be provided by SoCalGas.
- Property must be existing construction. New construction projects are not eligible.
- Both market rate and equity properties are eligible.
- Property must have three or more dwelling units. Eligible properties served on first-come, first-served basis.
- Must use licensed contractor, as appropriate, to install equipment.
- Must commit and show proof of financial ability to see project to completion.
- Work may only commence after a Notice to Proceed is signed and returned.
- A minimum of four program equipment must be installed.
- At least one of the four program equipment must be a Core Equipment, as further discussed herein.
- The property owner, authorized agent, or participating contractor must provide proof of finalized permit (for projects requiring a permit by the authority having jurisdiction).
- An in-person and/or virtual inspection will be conducted, requiring the customer to grant program representatives access to the installed equipment.
- Projects must be completed within six months from the Notice to Proceed or as otherwise indicated. Extensions may be granted on a project-by-project basis at the discretion of the Program. All program forms must be signed by the property owner or authorized agent.
- You may not receive an incentive for the same equipment or replacement of equipment from more than one California Investor-Owned Utility participating in this program or other third party programs offering rebates, financing and other incentives, funded with CPUC Public Purpose Surcharge funds. A property cannot receive an incentive for any equipment for which they received an incentive or rebate from SoCalGas in the prior five years.

*Natural gas saving tiers are calculated based on the percentage of savings from the approved scope of work equipment and the customer's annual energy consumption. In the event that the project cost decreases, the incentive will be recalculated based on the new project cost. If the project cost increases, any adjustments to the incentive amounts are subject to program approval.

**To obtain the total incentive amount, program representatives will multiply the Incentive per dwelling unit by the number of dwelling units (obtained from the customer's SoCalGas bill).

CORE EQUIPMENT REQUIREMENTS

Core equipment, also known as major capital improvements, include:

- New domestic hot water equipment, new space heating equipment (boiler or furnace, etc.) or envelope improvements (attic insulation).
- Two newer core equipment available include:
 - 1) Solar thermal water heating.
 - 2) Natural gas absorption heat pump water heater.
- A core equipment generally affects 75% of dwelling units at the property.
- Boilers/furnaces installed must be a minimum of 90% thermal efficiency.

Additional allowable equipment include, but are not limited to, the following:

- Pool/spa boilers, showerheads/aerators, pipe insulation, boiler controls, domestic hot water demand recirculation pump controls, smart thermostats, and washing machines.

ENERGY EFFICIENCY INCENTIVES

Project incentives are based on the energy savings from the approved scope of work.

Tier Incentive: The table below shows the CoMFI program's tiered incentive structure.

Tier	Natural Gas Savings*	Incentive per Dwelling Unit**
1	5%	\$300
2	10%	\$425
3	15%	\$570
4	20%	\$630
5	25%	\$750

Maximum Incentive: Will be based on the property type.

- **Market rate projects** can be incentivized up to 50% of total project cost. Market rate is defined as any property that is not equity as defined below.
- **Equity projects** can be incentivized up to 65% of project cost. To qualify, a project must be classified as a Disadvantaged Community (DAC) or Hard to Reach (HTR). To determine if a property qualifies as either DAC or HTR, please contact program support staff.

Please note the total project incentive will be based on either the tiered incentive structure determined by number of dwelling units at the property OR the maximum incentive level permitted, whichever is lower. Refer to general program guidelines.

GENERAL PROGRAM GUIDELINES

GENERAL

To be eligible for the CoMFI Program, customers must have an active SoCalGas account, meet program eligibility requirements and have existing natural gas qualifying equipment that is operational and ready for inspection.

The program incentive amount cannot exceed the cost of purchasing and professionally installing your equipment. Program incentives are designed to assist in offsetting some costs associated with high efficiency upgrades and do not cover additional costs such as permitting, shipping and taxes.

ELIGIBILITY REQUIREMENTS

Installed equipment must meet the requirements of the program as outlined in this guide. RHA and SoCalGas reserve the right to verify installation and deny payment for equipment that does not meet the requirements of the program.

All equipment must be new. Used or rebuilt equipment is not eligible. Fuel switching (changing from electricity to natural gas or from natural gas to electricity) does not qualify.

Qualified equipment must be installed at the property served by the SoCalGas account listed on the application and must be installed and operational according to state local building codes, ordinances, and/or manufacturer's requirements. A copy of the closed permit will be required when applicable.

Boiler controls and recirculation pump controls cannot be included as two separate project equipment due to overlapping energy savings. If both types of controls are installed, only one of them will be counted as a program equipment.

PROGRAM LIMITATIONS

No incentive will be paid for replacements of equipment types that have received a rebate or incentive from SoCalGas within the last five (5) years.

ENERGY EFFICIENCY FINANCING

The California Alternative Energy and Advanced Transportation Financing Authority has developed state-backed financing options to help eliminate upfront costs for property owners and managers. Additionally, SoCalGas offers zero percent On-Bill Financing for the purchase and installation of eligible energy-efficiency upgrades as part of an SoCalGas energy efficiency program. For more information on financing opportunities, visit socialgas.com/financing.

PAYMENT

The Program will issue the incentive to the customer (or contractor as approved by the customer) within fifteen (15) business days of receiving the project incentive payment from SoCalGas.

For incentive disbursement, customer or authorized payee will be required to provide a copy of their W-9.

USING A LICENSED CONTRACTOR

Hiring a licensed contractor who obtains the required building permit and has knowledge of and complies with local codes, ordinances and the requirements of the Building Energy Efficiency Standards (State Administrative Code, Title 24, Part 6) increases the likelihood that your system will be properly installed and will work efficiently, quietly and safely.

ENERGY EFFICIENCY BENCHMARKING

The California Energy Commission (CEC) has established regulations for a new statewide whole-building energy use and public disclosure program under California Assembly Bill 802 (AB 802). This statute went into effect on January 1, 2017, and the regulations require "covered" commercial, mixed-use and multifamily building owners to complete an annual energy performance benchmark via ENERGY STAR® Portfolio Manager®. For some covered buildings, there is an additional requirement to disclose your Portfolio Manager rating to the CEC.

SoCalGas can assist with securing your usage data, to meet benchmarking obligations for AB 802 or other local benchmarking ordinances.

For more information, visit socialgas.com/benchmarking.

The Comprehensive Multifamily Incentive Program is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) under the auspices of the California Public Utilities Commission, through a contract awarded to Richard Heath & Associates, Inc. (RHA). Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. Customers who choose to participate in this program are not obligated to purchase any additional goods or services offered by RHA or any other third party. The selection, purchase, and ownership of goods and/or services are the sole responsibility of customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. SoCalGas does not endorse, qualify, or guarantee the work of RHA or any other third party.** Eligibility requirements apply; see the program conditions for details.



ALL PROPERTY INFORMATION MUST BE ACCURATE AND INCLUSIVE OF PROPERTY DETAILS SPECIFIED IN YOUR SOCALGAS BILL(S). ALL ITEMS ARE REQUIRED; INCOMPLETE APPLICATIONS WILL NOT BE PROCESSED AND WILL BE RETURNED. PROGRAM APPLICATION IS TO BE COMPLETED BY THE PROPERTY OWNER OR LEGALLY AUTHORIZED AGENT FOR THE PROPERTY OWNER.

SECTION 1: ACCOUNT INFORMATION

(as it appears on your SoCalGas bill)

Form fields for account information including SoCalGas Account Number, Facility Square Footage, Number of Dwelling Units at Property, Name, Business DBA Name, Service Address, Unit/Suite Number, City, State, Zip, Contact Information Belongs to (Property Owner/Authorized Agent), Contact Name, Contact Title, Contact Phone Number, and Email Address.

List Additional Property Accounts (include the SoCalGas account number and number of dwelling units for each account).

Is the property deed restricted? [] Yes [] No [] Don't Know
Do tenants predominantly speak a language other than English? [] Yes [] No

PROPERTY OWNER OR AUTHORIZED AGENT (original or digital signature required)

I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE EQUIPMENT FOR WHICH I AM REQUESTING AN INCENTIVE MEET THE REQUIREMENTS LISTED ON THE PROGRAM ELIGIBILITY REQUIREMENTS.

Check One: [] Property Owner [] Authorized Agent

I, _____, hereby certify that I am authorized to make this declaration as the Customer or as an authorized representative of the Customer _____. By signing below, I certify the following to the best of my knowledge:

_____ The existing equipment being replaced is in operating condition and in use.
_____ Without the program's rebate, incentive, support and energy savings information, we would have continued to maintain the existing equipment for at least another year.

I acknowledge that misrepresentation will result in a rejection of all or part of the project and that the Customer may be subject to additional scrutiny that may result in Customer exclusion from current and future incentive programs.

Print Name Signature Date

SECTION 2: PAYMENT AUTHORIZATION FORM

ALL PROPERTY INFORMATION MUST BE ACCURATE AND INCLUSIVE OF PROPERTY DETAILS SPECIFIED IN YOUR SOCALGAS BILL(S). PROGRAM APPLICATION IS TO BE COMPLETED BY THE PROPERTY OWNER OR AUTHORIZED AGENT FOR THE PROPERTY OWNER.

Must be completed fully to be processed.

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SoCalGas Account Number

Name (as it appears on your SoCalGas bill)

PROPERTY OWNER OR AUTHORIZED AGENT

Check One: Property Owner Authorized Agent

Name

Daytime Phone Number

Email Address

PROPERTY INFORMATION

Site or Complex Name

Site Contact Person/Inspection Contact

Title

Site Contact Daytime Phone Number

Service Address (address on the SoCalGas bill if different from site address)

City

Zip

Rate Schedule (Example: GR, GM, GT, etc.)

PAYEE INFORMATION

Payee name, tax status and EIN/SSN must match the provided W-9

Tax Status: Corporation Non-corporation Exempt (e.g., tax exempt, non-profit)

Payee Name (make check payable to:)

Federal Tax ID Number or SSN

Mailing Address

City

Zip

PAYMENT RELEASE AUTHORIZATION (signature required)

Property Owner or Authorized Agent for the Property Owner

Your authorization is required if the check is to be made payable to another individual or entity. Please sign below.

Your authorization is required if the incentive check is to be made payable to another individual or entity. By signing below, I am authorizing this payment of my incentive to the third party ("Payee") named above and I understand that I will not be receiving an incentive check from SoCalGas. I also understand that my release of the payment to the Payee does not exempt me from the requirements outlined in this application. If Payee is a business, federal tax ID or Social Security Number must be provided. SoCalGas will report this payment made to the third party on IRS form 1099 as "Other Income" to you (the customer receiving the benefit of the payment) unless the payment is less than \$600, or you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the tax requirements of incentives. SoCalGas is not responsible for any taxes that may be imposed on you as a result of this incentive.

Print Name

Signature

Date

Incentives are generally considered subsidies for tax purposes and could be taxable income. You are urged to consult your tax advisor concerning the taxability of this incentive. Incentives greater than \$600 will be reported to the IRS on Form 1099 unless you have checked corporation or exempt tax status above on Payee Information. SoCalGas is not responsible for any taxes that may be imposed on your business as a result of your receipt of this incentive.

I understand that I cannot receive a rebate or incentive for the same equipment from more than one California investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with California Public Utilities Commission Public Purpose Surcharge funds.

SECTION 3: TERMS AND CONDITIONS

1. I desire to participate in the Comprehensive Multifamily Incentive Program and, as a condition of my participation, agree to the terms and conditions identified below. I understand that I may qualify for incentives to perform energy efficiency upgrades to my property, depending on the geographic location and income levels of tenants in my property.
2. I understand that (a) applications are accepted on a first-come, first-served basis while funding is available, or until discontinued by the California Public Utilities Commission (CPUC) and must be postmarked within 45 days after the 2026 program termination date to be considered eligible for an incentive, and (b) qualified equipment must be purchased and installed according to the Notice to Proceed. I understand these purchase and install periods will end earlier if funds are no longer available, and this program shall at all times be subject to change or termination without prior notice. INCOMPLETE and INCORRECT APPLICATIONS WILL NOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis, based upon the new receipt date.
3. I certify that I am an eligible SoCalGas customer paying Public Purpose Surcharge and equipment specified in the scope of work is for use in the Comprehensive Multifamily Incentive Program and not resale or otherwise.
4. I acknowledge that the program requires a contractor proposal before a Reservation Form is issued, delineating the chosen scope of work with each equipment itemized, listing the equipment manufacturer name(s), model number(s), serial number(s), quantity(s), and costs.
5. I understand incentives will only be paid for projects that install a total of four (4) equipment including at least one (1) core equipment. A core equipment generally affects 75% of dwelling units on the property. Any deviation to this requirement will require approval by RHA and SoCalGas in their sole discretion.
6. I represent that I am either the property owner or an authorized agent for the property owner, of the residential multifamily dwelling described in this application, which is occupied by SoCalGas customer(s) and has a valid meter(s) served by SoCalGas. I understand that I am only eligible to receive an incentive for equipment that correspond directly to natural gas distribution for which my residential multifamily dwellings currently receive service from SoCalGas. Residential multifamily dwellings are defined as residential apartments, homeowners associations and/or mobile homeowners association and/or mobile home parks with three or more units. The dwelling units must be fully constructed and occupied. New construction does not qualify.
7. I will allow, if requested, representatives from SoCalGas, the CPUC, or RHA access to my property to inspect the condition, document the existing equipment, and verify the installed equipment before an incentive is paid. I understand that an incentive will not be paid if I refuse to participate in any required verification. I understand these inspections are for the purpose of determining that the installed equipment meet all program(s) requirements. I agree to these inspections to be eligible to participate in the program and receive an incentive for the qualified equipment.
8. I understand this project may be selected for evaluation studies and/or program measurement by external contractors appointed by the CPUC. These studies are used to analyze and improve program performance. I agree to participate by responding to inquiries from these external contractors as required by the program even after the project is completed.
9. I certify the information on this form is true and correct, and the tax ID provided is accurate. I understand that payments are based on related energy benefits over the life of the equipment. I agree to:
 - Maintain the energy-efficient equipment specified in the final scope of work for a minimum period of five (5) years from receipt of incentive funds.
10. I understand this form must be filled and completed by the owner or owner's authorized agent and received by RHA in person, through the Program Website or the Energy Efficiency Collaboration Platform (EECP).
11. I acknowledge that I would not have undertaken an energy efficiency equipment upgrade at this time if RHA and SoCalGas had not offered this program.
12. Upon installation of qualified equipment, I will submit the required documents establishing proof-of-purchase for the finalized equipment reflecting the equipment approved in the Notice to Proceed. The required documents are inclusive but not limited to:
 - a. Paid-in-full itemized sales receipt(s) that includes the model number and quantity of units for each line item
 - b. Paid contractor invoice or paid Home Improvement Contract (HIC), with manufacturer name(s), model number(s), serial number(s), square footage, line itemed equipment costs, and any other required documentation
 - c. Project permits approved and closed as required by federal, state and local jurisdictions
 - d. Other documentation requested to prove project program compliance
13. I certify that all energy-efficiency equipment were purchased new, and I understand that resale equipment and equipment leased, rebuilt, rented and received from insurance claims or won as a prize, or new parts installed in existing equipment do not qualify.
14. In the event that I choose to participate in the On-Bill Financing Program (OBF) offered by SoCalGas to obtain financing for the equipment listed on this form, I understand that OBF terms and conditions will control (including, without limitation, the incentive amount of the equipment listed in the Reservation Form) if there is any conflict between the Comprehensive Multifamily Incentive Program or OBF terms and conditions.
15. The qualified equipment may be self-installed, installed by a contractor, manufacturer, or an appliance dealer. I understand that customers who self-install may not charge installation labor as part of the project cost.
16. Tier incentive structure: The energy savings achieved from the selected scope of work equipment, compared to the customer's natural gas use baseline, will determine the customer's incentive tier. Customers with energy savings from 5% to 9.99% will receive a Tier 1 incentive of \$300 per dwelling unit (customers with less than 5% energy savings will not qualify for incentives and will not receive a Reservation Form). Customers with energy savings from 10% to 14.99% will receive a Tier 2 incentive of \$425 per dwelling unit. Customers with energy savings from 15% to 19.99% will receive a Tier 3 incentive of \$570 per dwelling unit. Customers with energy savings from 20% to 24.99% will receive a Tier 4 incentive of \$630 per dwelling unit. Customers with energy savings of 25% or greater will receive a Tier 5 incentive of \$750 per dwelling unit. For incentive purpose, the number of dwelling units will be determined by the total number of dwelling units in the customer's SoCalGas account(s) listed on this application or provided in written communication prior to the Reservation Form being issued.

SECTION 3: TERMS AND CONDITIONS

17. Maximum project incentive amount: In no case will the incentive amount exceed 50% of the project cost for market rate multifamily properties or 65% of the project cost for DAC and HTR multifamily properties. Project cost includes materials cost plus installation labor. Permitting, shipping charges, and taxes are not covered in the program and should be excluded from the project's invoices.
18. The incentive amount will be calculated based on the maximum project incentive amount or the tier incentive structure of the program, whichever is lower. In the event that the project cost decreases, the incentive will be recalculated based on the new project cost. If the project cost increases, any adjustments to the incentive amounts are subject to program approval.
19. I certify that I have not received rebates, incentives, or services for the same equipment from other utilities, states, or local programs funded by the Public Purpose Surcharge. However, I understand that water utilities are not funded by the Public Purpose Surcharge and I may apply for their rebates.
20. I am aware that incentives exceeding \$600 for business customer accounts are subject to taxation and will be reported to the IRS using Form 1099, unless I have identified myself as a corporation or exempt entity. It is advised that I consult with a tax advisor regarding the tax implications of receiving incentives. Neither SoCalGas nor RHA assume responsibility for any taxes that may be levied on myself or my property as a result of receiving this incentive. The payee listed in the payment authorization form must provide the latest W-9 form before the incentive can be disbursed.
21. I acknowledge and accept full responsibility for choosing energy-efficiency equipment, selecting contractors, manufacturers, or dealers, purchasing materials, work performed, and the payment thereof are my sole responsibility.
22. I understand that neither SoCalGas nor RHA make any representations or warranties regarding equipment, services, contractors, manufacturers, dealers, materials, or workmanship in relation to this program. I waive any and all claims against SoCalGas and its affiliates, and its and their respective directors, officers, employees and authorized agents (collectively, "SoCalGas Parties," and each, individually, a "SoCalGas Party") and RHA, and I will indemnify and hold harmless the SoCalGas Parties and RHA for any claims related to the installation and use of energy efficiency equipment or this program. To the maximum extent permitted by law, none of the SoCalGas Parties or RHA shall be liable for any damages, regardless of the form of action, including negligence, and they have no liability regarding the quality, safety, or installation of the energy efficiency equipment.
23. I am responsible for meeting all program requirements and complying with my state/county/city governments, the property owner and/or homeowners' association requirements (if any) in my area regarding local conditions, restrictions, codes, ordinances, rules and regulations pertaining to all installations. I further understand that it is my sole responsibility to ensure all incentivized equipment are installed as per all manufacturers' specifications to achieve the energy efficiency goals of the program.
24. I understand the SoCalGas Parties and RHA are not responsible for items lost or destroyed in transit.
25. All installed equipment must conform to their statewide deemed measure packages found on eTRM (www.caetrm.com) as requirements and exclusions for each measure package will vary.
26. I am aware that this agreement is for the purposes of energy assessments & site inspections and does not guarantee admission into the Comprehensive Multifamily Incentive Program. I authorize access to the location(s) listed on this application and the site's natural gas consumption data for the purpose of performing energy assessments & site inspections by RHA. I agree to indemnify, and hold SoCalGas Parties, RHA, and the Comprehensive Multifamily Incentive Program harmless from any claims, losses, expenses, liabilities, and damage or destruction of this property arising out of the energy assessments & site inspections.