



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.

CoMFI Program Process

1. Apply to the CoMFI Program

Submit your completed application to participate in the program.

2. No-Cost Energy Assessment

A CoMFI Program team member will schedule and conduct a no-cost energy assessment of the property to identify potential upgrade opportunities.

3. Select Your Qualified Installation Contractor

You may either select your own licensed contractor, or the program staff can provide a list of participating licensed contractors to choose from.

4. Reserve Your Energy Efficiency Incentive

A CoMFI Program team member will work with your property and selected contractor to finalize the project's scope of work and reserve incentive funds.

5. Notice to Proceed or Start Construction

Once the eligible scope of work has been approved, a CoMFI Program team member will provide a notice to proceed with construction.

6. Project Completion and Closeout

When construction is complete, a CoMFI Program team member will perform an onsite inspection and collect the necessary program documents. Subject to the Terms and Conditions, once all documentation has been received and verified, a check will be issued to the designated payee.

For More Information

Contact a CoMFI representative Monday to Friday, 8:00am to 5:00pm (excluding holidays):

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



Richard Heath & Associates, Inc. is a SoCalGas authorized contractor responsible for implementing this program through 12/31/2027.

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.

Program Eligibility Requirements

- Must have existing natural gas qualifying equipment that is operational and ready for inspection.
- The program incentive amount cannot exceed the cost of purchasing and do not cover additional costs such as permitting, shipping and taxes.
- All installed equipment must be new.
- Fuel switching (changing from electrical to natural gas and vice versa) does not qualify under the program.
- Property must be existing construction. New construction projects are not eligible.
- Property must have three (3) or more dwelling units.
- A minimum of three (3) program equipment must be installed, with one being a Core.
- 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 (6) 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.
- The program will issue incentive to the customer (or contractor as approved by the customer) within ninety (90) business days of project closeout.
- For incentive reimbursement, customer or authorized payee will be required to provide a copy of their W-9.
- Upon installation of qualified equipment, you must 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

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

For more information, visit socalgas.com/benchmarking.

*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.

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.
- All installed equipment must conform to their statewide deemed measure packages found on eTRM (caetrm.com) as requirements and exclusions for each measure package will vary.

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*	Project Cost Incentive
1	10-14%	25%
2	15-24%	40%
3	25-49%	60%
4	50-74%	75%
5	75-100%	100%

Project cost incentives will be capped at a maximum value of \$100,000. Projects may qualify for an additional 5% to the project cost incentives for the respective tier. For example, tier 2 would now provide 45% of the project cost as the incentive. Incentives will not exceed 100% of the project cost.



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.

Property Information

<input type="text"/>	<input type="text"/>	<input type="text"/>
SoCalGas Account Number	Facility Square Footage	Number of Dwelling Units at Property

Name (as it appears on your SoCalGas bill)

<input type="text"/>	<input type="text"/>
Service Address (as it appears on your SoCalGas bill)	Unit/Suite Number

<input type="text"/>	<input type="text"/>	<input type="text"/>
City	State	Zip

Contact Information Belongs to: Property Owner Authorized Agent

<input type="text"/>	<input type="text"/>
Contact Name	Contact Title

<input type="text"/>	<input type="text"/>
Contact Phone Number	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

Is the Primary Language Spoken by Tenants English? Yes No

Is the Primary Owner Interested in Financing Options? Yes No

Payee Information

Payee name and tax status must match the provided W-9

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

Payee Name (make check payable to:)

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. RHA, Inc. 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 or RHA is not responsible for any taxes that may be imposed on you as a result of this incentive.

Print Name

Signature

Date

Terms And Conditions

1. I understand, acknowledge, and agree to the following Terms and Conditions, which form a part of the application form for my participation in the Comprehensive Multifamily Incentive program ("CoMFI").
2. I understand the Program is available all eligible Southern California Gas Company ("SoCalGas") multifamily customers that hold an active service account with an active SoCalGas meter and service territory address. At least 75% of the dwelling units at the property must be tenant occupied.
3. I understand the Program, including the application requirements, as well as individual energy efficiency products, measures, or equipment ("Equipment") offered as part of this Program, may be modified, or terminated at any time without prior notice. Any information, results, and reports regarding your participation in the program may be made available to the California Public Utilities Commission ("CPUC").
4. I understand the Program, including these Terms and Conditions, may be revised at any time without notice. In such an instance, unless otherwise prohibited under applicable law (including any CPUC order or directive), signed applications will be processed to completion under the Terms and Conditions in effect of the date of such signed application.
5. I understand the Program may end sooner than 12/31/2027 if allocated funds are depleted. Equipment purchases and installations made prior to or after this specified term do not qualify for a rebate(s), incentive(s), and/or service(s). Program funds are limited. All applications are processed on a first-come, first-served basis, upon receipt, until funds are no longer available. I understand rebate(s), incentive(s), and/or service(s) are determined by the date the application is received. **INCOMPLETE and INCORRECT APPLICATIONS CANNOT BE PROCESSED.** Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date. In the event rebate(s) and/or incentive(s) amounts change during the Program period, the order/purchase data and/or application postmark date will be used to determine Equipment eligibility and rebate or incentive amount. Rebate(s) and incentive(s) offerings and amounts may change without notice during the Program term. **Deemed Projects:** I understand to receive a rebate(s), applications must be submitted, approved, and installed within (12) twelve months of the purchase date. Exceptions must be in writing and can only be granted at SoCalGas's sole discretion. **Custom Projects:** I understand to receive an incentive(s): (1) a completed Application must be submitted and approved before ordering Equipment; and (2) an executed Conditional Incentive Reservation (CIR) form prior to Equipment installation (the Equipment cannot be connected to a natural gas line until the CIR form is executed).
6. I have not received a rebate(s), incentive(s), and/or service(s) for the same Equipment from any other California Investor-Owned Utility (IOU), states or local third-party energy efficiency program funded by the Public Purpose Program Surcharge (PPPS). I cannot receive a rebate(s), incentive(s) and/or service(s) for the same Equipment from more than one California IOU participating in this Program or any other third-party programs offering rebates, financing, and/or other incentives funded by the CPUC. I understand that I cannot receive a rebate(s), incentive(s) and/or service(s) for any Equipment for which I have received a rebate(s), incentive(s) and/or service(s) from SoCalGas within five (5) years prior to the application date. Equipment receiving a SoCalGas rebate(s) or incentive(s) at the point-of-sale, as an instant markdown, through a Regional Energy Network or Home Upgrade Program, or through a manufacturer/distributor, do not qualify for a mail-in or online rebate(s), incentive(s), and/or service(s).
7. I understand rebate(s), and/or incentive(s) amount cannot exceed the actual purchase price of the Equipment (or the maximum allowance per unit), which includes materials cost plus installation labor, but does not include taxes or shipping costs. Richard Heath & Associates, Inc. ("RHA") and SoCalGas reserve the right to limit the number of Equipment receiving rebates or incentives. Customers who self-install may not charge installation labor. I agree to remove and dispose of the Equipment being replaced by the Equipment in accordance with all federal, state, and local laws.
8. I certify the installed qualifying Equipment in accordance with all applicable federal, state, county, city and local laws, rules, and regulations, including building codes, homeowner's association (if applicable), manufacturer's specifications, and permitting requirements, and understand the energy-efficiency level of the qualifying Equipment (as defined in the specification sheet) determines the rebate(s) and/or incentive(s) amount. If a contractor performed the installation or improvement, the contractor holds the appropriate license for the work performed.
9. I understand rebate(s) and/or incentive(s) payments are based on related energy benefits over the life of the Equipment. I agree to maintain the Equipment specified in this application: (1) 100% functional for the life of the Equipment or a period of (5) five years from receipt of the rebate(s) and/or incentive(s) funds, whichever is less; and (2) continue to be a customer of SoCalGas during said time period. If any of the above ceases to be the case, I shall refund a prorated amount of the rebate(s) and/or incentive(s) dollars to SoCalGas based on the actual period of time for which I provided the related energy benefits as a customer of SoCalGas. I certify that all Equipment was purchased new, and I understand that resale Equipment and Equipment leased, rebuilt, refurbished, purchased at auction, rented, received from insurance or warranty claims, or won as a prize, received as a gift, purchased with reward points; or, new parts installed in existing products, do not qualify. I understand that rebate(s) and/or incentive(s) will only be paid for Equipment that meets the specifications of the Program.
10. I certify that the information provided on this application is true and accurate. I understand that the rebate(s) and/or incentive(s) could be taxable, and that I am urged to consult my tax advisor concerning the taxability of any rebate(s) and/or incentive(s) paid through this Program. The rebate(s) and/or incentive(s) that are greater than \$600 will be reported to the IRS on Form 1099 unless I have identified myself as a corporation or have tax exempt status and have noted as such in this application. Neither SoCalGas nor RHA are responsible for any taxes that may be imposed on me or my business as a result of the receipt of rebate(s) and/or incentive(s).
11. I understand that RHA is a SoCalGas authorized contractor responsible for implementing the Program through 12/31/2027. I understand that the installation of the Equipment may require RHA and/or SoCalGas to enter my facility. I agree to permit RHA, and/or SoCalGas, and its

authorized subcontractors to: (1) Review completed and signed application; (2) Install qualifying Equipment; and (3) Verify installation of Equipment at my facility, as applicable.

12. I understand neither SoCalGas nor RHA shall have: (1) Any obligation to maintain, remove, or perform any work whatsoever on the installed Equipment; or (2) Any liability arising from a contractor's installation of the applicable Equipment or its failure to perform, for failure of the Equipment to function, for any damage to my premises caused by the contractor, or for any damages to property or injuries to persons caused by the Equipment.
13. I understand all Projects are subject to evaluation studies of Equipment by 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 contractors in a timely manner.
14. I will allow, if requested, a representative from SoCalGas, RHA, the CPUC, and/or any authorized third-party reasonable access to the property where the Equipment is located to verify the installed Equipment before the rebate(s) and/or incentive(s) are paid. I understand that neither a rebate(s) nor incentive(s) will be paid if I refuse to participate in any required verification. I understand that SoCalGas, RHA, CPUC and/or any authorized third party may contact the qualifying Equipment vendor and/or installer to verify purchase and/or installation of the Equipment and may provide my name and/or address to complete this verification. I understand this inspection is for the purpose of determining that the installed Equipment meets all Program requirements. I understand that rebate(s) and/or incentive(s) applications that are submitted to SoCalGas may be randomly selected for inspection to ensure Program and quality control compliance, and that a virtual video or in-person inspection may be requested and Geo-Tagged photo to verify the installation of the Equipment prior to the rebate(s) and/or incentive(s) payment.
15. I acknowledge that I have been notified of SoCalGas's California Consumer Privacy Act (CCPA) Policy. Personal information may be solicited; visit socialgas.com/CCPA to review SoCalGas's CCPA Notice at Collection.
16. Customer Affidavit Statement per Resolution E-5115: I represent that I hereby certify that I am authorized to make this declaration as the Customer or as an authorized representative of the Customer. I certify that the existing equipment being replaced is in operating condition to the best of my knowledge. I acknowledge that misrepresentation will result in a rejection of all, or part of the project and that the Customer may be required to return the incentives associated with this project. I further acknowledge that misrepresentation will result in future projects submitted by the Customer being subjected to additional scrutiny and may result in Customer probation or suspension from current and future incentive programs.
17. HVAC WORKFORCE STANDARD QUALIFICATION REQUIREMENTS. Pursuant to CPUC Decision (D.)18-10-008, starting July 01, 2019, I represent that if my project involves the installation, modification or maintenance of non-residential heating, ventilation, and air conditioning (HVAC) measures and I am applying for an incentive of \$3,000 or more, that such project has been (or, will be, upon completion) installed by technicians each of whom has one of the following criteria; (1) Completed a California or federal accredited HVAC apprenticeship; (2) Is currently enrolled in a California or federal accredited HVAC apprenticeship; (3) Completed at least five (5) years of work experience at the journey level as defined by the California Department of Industrial Relations definition (Title 8, Section 205, of the California Code of Regulations), passed a practical and written HVAC system installation competency test, AND received credentialed training specific to the installation of technology being installed; or (4) Holds a C-20 HVAC contractor license from California State Contractor's Licensing Board. Prior to any of such measures being installed, modified, or maintained, each technician rendering such work has provided (or will provide) their applicable qualification documentation for HVAC Measure Installation Qualification, which must be included in the application form.
18. **I agree that the selection of Equipment, selection of contractor, manufacturer, dealer, supplier and/or installer, and purchase, installation and ownership and maintenance of (including work performed and services rendered with respect to) the Equipment referenced in this application package are my sole responsibility, that SoCalGas makes no representation, qualification, endorsement or guarantee about any of the foregoing, and that the contractor, manufacturer, dealer, supplier or installer of such Equipment and measures is not an agent or representative of SoCalGas or RHA SoCalGas makes no warranty, whether express or implied, including the implied warranty of merchantability or fitness for a particular purpose, use or application of the Equipment or energy efficiency measures related thereto, and SoCalGas expressly disclaims such warranty. I acknowledge that I am not obligated to purchase any additional goods or services offered by any such contractor due to my choice to participate in this Program. I understand that my reliance on warranties is limited to any warranties that may arise from or be provided by contractors or vendors providing goods or performing services in connection with Equipment. Neither SoCalGas nor RHA are responsible for assuring the design, engineering, or construction of the facility or installation of the Equipment are proper or comply with any particular laws (including patent laws), codes, or industry standards. Neither SoCalGas nor RHA make any representations of any kind regarding the results to be achieved by the Equipment or the adequacy, safety, reliability, and/or efficiency of such Equipment.**
19. I agree that SoCalGas has no liability whatsoever concerning: (1) The quality, safety, performance or other aspect of any design, system, energy efficiency Equipment installed pursuant to the Program and/or installation of the Equipment, including their fitness for any purpose; (2) The estimated energy savings of the Equipment; (3) The workmanship of any third parties; (4) The installation of use of the Equipment including, but not limited to, effects on indoor pollutants; and (5) Any other matter with respect to the Program.
20. **I waive any and all claims against SoCalGas, its parent company, affiliate companies, directors, officers, employees, or agents (collectively, "SoCalGas Parties"), arising out of activities conducted by or on behalf of SoCalGas in connection with my application for any rebate(s), incentive(s), and/or service(s) under the Program. Without limiting any of the foregoing, to the maximum extent permitted under**

applicable law, none of the SoCalGas Parties, RHA nor any of their respective affiliates shall be liable to me or any other parties for any types of damages, whether direct or indirect, special, consequential, exemplary, reliance, punitive or incidental damages, including damages for loss of use, regardless of the theory of recovery, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind, caused by, in connection with, or arising from any activities associated with this Program. To the maximum extent permitted under applicable law, I agree to indemnify the SoCalGas parties against all loss, damage, expense, fees, costs, and liability arising from any claims related to the use of any equipment installed or services performed during the installation or maintenance of such equipment referred to in my application for any rebate(s) or incentive(s) under the program.

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