

Worcester Energy Program Residential Rebate Pilot

Application Instructions

The City of Worcester has allocated monies from its Green Communities Grant to cover the materials, equipment and installation costs of recommended energy efficiency and conservation measures and renewable energy installations for eligible home renovation projects. Rebate amounts and eligible projects can be found on the Rebate Table in the Pilot Guide.

Pilot Eligibility Requirements for Pilot Participants:

- 1) City of Worcester existing residential dwellings with no more than 4 dwelling units;
- 2) While the owner can designate an applicant to apply on their behalf, the owner will have to sign all applicable sections of the application.
- 3) Note: Applications will be accepted both for owner-occupied and non-owner occupied dwelling units.

The Application Form should be accompanied by the following attachments:

1. **Mass-Save Energy Assessment with an Energy Performance Scorecard (existing and projected) from Energy Monster or Next Step Living.** This assessment will also provide you with a list of possible energy efficiency & conservation measures for your home and access to additional utility / government rebates you are eligible for.
2. **Contractor Cost Estimate(s)** (including EPS estimate/invoice) itemized by measure and including all utility incentives for the work outlined by the MassSave Energy Assessment.
3. **Oil utility usage data** for the previous two (2) years from your energy providers if currently using **oil** to heat your home.
4. **Income eligibility** supporting documentation if you are seeking to claim this additional benefit (see instructions in the application).

Submit the completed application package to:

Worcester Energy Program; c/o Division of Planning & Regulatory Services
City Hall - 455 Main Street, Room 404, Worcester, MA 01608

Please see the **Pilot Guide & Requirements** for more information.

NOTES:

- Rebate costs cannot exceed total net costs (e.g. gross costs less eligible & received MassSave/other energy efficiency incentives) for labor and materials for each project. EPS (Energy Performance Scorecard) costs are rebate eligible.
- The post-test score cannot be the same or higher than the pre-test score.
- Any work on a residential building requires a **Building Permit** (including insulation, boiler replacement, etc.), except for ordinary repairs, as defined in 780 CMR, 51.00, Subsection R105.2.
- Measures identified in your Energy Assessment may not be approved for a rebate based on the condition of the home, safety concerns, minimal energy savings or any other reason, at the sole discretion of the Worcester Energy Program Manager, including, but not limited to, insufficient program funds.
- Work must be performed by a **Licensed Contractor**.



Executive Office of Economic Development
Planning & Regulatory Services Division ~ Worcester Energy Program
Worcester City Hall, 455 Main Street, Room 404 (4th floor), Worcester, Massachusetts 01608
Telephone: (508) 799-1400 x5 Fax: (508) 799-1406
Email: worcesterenergy@worcesterma.gov
Website: www.worcesterenergy.com
Last revised February 27, 2014



Worcester Energy Program Residential Rebate Pilot

Application Form

Date

Applicant/Project Information

Applicant's Name:

Owner's Name (deed holder) (if different):

Address of Property to be assisted: (include city, state, zip):

Owner's Primary Address (if different):

Total Number of Dwelling Units in the Building:

Total Number of Dwelling Units Applied for the Rebate:

1) Applicant's Contact & Eligibility Information:

Applicant's Mailing Address (include city, state, zip):

Applicant's:

Home Phone:

Cell Phone:

E-mail:

Building's Age:

Is/are the units occupied?

If no, please explain how long each was not occupied:

Is the unit owner-occupied? Yes / No

Heating Fuel Type

Oil

Natural Gas

Electricity

Other

2) If there are commercial uses in the building, please explain their nature, size (floor square footage), and location within the building. Please state whether or not the heating/cooling system for this space is shared or separate:

3) Are you completing any other home renovation work at this time that is not part of this Application? Please explain.

4) Are you a City of Worcester employee or a Board/Commission member?

5) Are you claiming the additional Income Eligible benefit (see explanation below)? Yes / No

6) Fill out the requested information in the table below:

Proposed Energy Efficiency/Conservation Measures Description				
	Proposed Energy Efficiency/Conservation Measures Description (can include the cost of the EPS)	Cost (\$) of the Measures (per the attached Contractor Quote/s):	Applicable Utilities / Other Governmental Incentives & Rebates (per the attached MassSave Energy Assessment or other):	Remaining Cost after Incentives & Rebates:
1		\$	\$	\$
2		\$	\$	\$
3		\$	\$	\$
4		\$	\$	\$
5		\$	\$	\$
6		\$	\$	\$
7		\$	\$	\$
8	TOTAL =	\$	\$	\$

7) By signing below, you verify that all the information provided in this application is accurate and true to the best of your knowledge. You also acknowledge that completing this application does not ensure that your application will be approved and selected for the pilot. If you have questions or need assistance completing this form, please contact us at 508-799-1400 x5 or by email at worcesterenergy@worcesterma.gov.

Owner's Name (please print): _____

Owner's Signature: _____ Date: _____

If the applicant is different from the owner, please also sign the following:

Applicant's Name (please print): _____

Applicant's Signature: _____ Date: _____

Utility Data Consent Agreement

The Worcester Energy Program’s Residential Rebate Pilot is designed to make it easy for participating home owners to receive available National Grid and NSTAR Gas energy efficiency rebates and incentives and to evaluate the effectiveness of energy efficiency measures that are installed as a result of this pilot.

In order to complete this evaluation, we ask that you sign the consent agreement noted below. This will allow National Grid and NSTAR Gas to share energy use and billing history (up to 2 years prior and 2 years after the work has been completed) with us as well as information about any energy upgrades you implement.

Enrollment Information

National Grid

Account Number _____
Account Holder _____
Mailing Address _____
(account location) _____

NSTAR Gas

Account Number _____
Account Holder _____
Mailing Address _____
(account location) _____

Consent Agreement

I agree to allow National Grid and/or NSTAR gas to release the energy usage data, billing history and any information on energy upgrades in connection with the address and account number written above (the “Information”) to the City of Worcester (collectively, the “Parties”) for the purposes of the Worcester Energy Program’s Residential Rebate Pilot. I understand this authorization will be valid for two (2) years following the issuance of the Certificate of Approval by the Department of Inspectional Services for this project. I understand that MA Public Record Law will apply to this data.

I agree to release and hold harmless National Grid, NSTAR Gas and the City of Worcester from any claims, damages or expenses resulting from providing the Information to the Parties or the use of the Information by the Parties.

Please accept this request for information under the authority of this form as if the request was made directly to National Grid and/or NSTAR Gas who is permitted to accept this form as authentic whether it is the original executed document or a copy thereof. My signature affirms that I have the authority to make and sign this request on behalf of my company.

Owner’s Name (please print): _____

Owner’s Signature: _____ Date: _____

Low Income Eligibility Form

Low-income individual owners can be reimbursed up to 100% of net costs up to \$5,000 per dwelling unit (see the Pilot Guide & Requirements for additional information).

The City's Worcester Energy Residential Rebate Pilot utilizes Federal United States Housing and Urban Development (HUD) guidelines, in part, to determine whether or not an applicant is low income eligible.

Low Income Eligibility Criteria:

1. Low income eligibility can only be granted to those individuals who are applying to the program for owner-occupied properties in which the applicant(s) resides as their primary residence. Properties owned by a trust, non-profit or other type of ownership structure are not eligible for low income eligibility.
2. Household annual income must not exceed 80% of the median income for Worcester, MA as determined by HUD:

2014 Income Limits*	
Persons in Family / Household	Low Income guideline (80% of the Median Income for Worcester, MA)
1	\$44,750
2	\$51,150
3	\$57,550
4	\$63,900
5	\$69,050
6	\$74,150
7	\$79,250
8	\$84,350

*Income limits are updated annually by HUD¹

To qualify for low income eligibility, a home owner must provide the information requested in the table below. Please submit this information to the City of Worcester along with your application for the Residential Rebate Pilot.

The applicant(s) must also **include the most recent W2 or equivalent tax form for each member of your household who files taxes**. The City will review the information and may contact you to obtain additional verification documentation including, but not limited to pay stubs, bank statements, and address verification forms for all claimed occupants. Once all requested documentation has been received and reviewed, applicant(s) will be notified as to eligibility.

¹ <http://www.huduser.org/portal/datasets/il/il14/index.html>

Household Employment & Income Information

Please list all persons who intend to reside in the property. All income must be listed for all household members over the age of 18².

If an individual has more than one employer, please include each as a separate entry. List all household members including those that have no income.

Please list all family members that reside in household						
Family Member (age)	a. Wages/ Salaries	b. Business Income	c. Interest/ Dividends	d. Benefits/ Pensions	e. Public Assistance	f. Other Income
1. Totals	a.	b.	c.	d.	e.	f.
2. Enter total of items 1a. Through 1f.	2.					

Acknowledgement

Through my signature, I hereby certify the information provided in this application is complete and correct to the best of my knowledge. I am aware of eligibility requirements of the Worcester Energy Residential Rebate Pilot. I hereby certify that I am, to the best of my knowledge, eligible for assistance through the aforementioned program. Additionally, I hereby certify that I understand that if the City of Worcester finds my information to be fraudulently represented, I will be liable for repayment of all Program funds.

I hereby authorize the City of Worcester’s Executive Office of Economic Development to independently verify the information provided in this application.

Owner’s Name (please print): _____

Owner’s Signature: _____ Date: _____

Co-Owner’s Name (please print): _____

Co-Owner’s Signature: _____ Date: _____
(If applicable)

² *Types of income, as highlighted in 24 CFR 5.609(b), to be included: gross wages, salaries, overtime, fees, tips, and bonuses from all jobs, Net income from business, interest and dividends, Social Security income (if applicable), SSI Disability, annuities, pensions, insurance policies, unemployment income, disability income, workman’s compensation, welfare assistance, alimony, child support, and all regular and special pay through the Armed Forces.