



## **2016 PARTICIPANT HANDBOOK**

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### **POLICIES AND PROCEDURES FOR PARTICIPATION IN THE STATEWIDE SAVINGS BY DESIGN PROGRAM**

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**[www.savingsbydesign.com](http://www.savingsbydesign.com)**

This program is funded by California utility ratepayers and administered by Pacific Gas & Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company under the auspices of the California Public Utilities Commission. The municipal portion of this program is funded and administered by Sacramento Municipal Utility District and Los Angeles Department of Water and Power.

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**NEW FOR 2016**

Owner Incentive  
Whole Building  
Approach

- No program offering changes

Design Team Incentive  
Whole Building  
Approach

- No program offering changes

## 1 **PROGRAM OVERVIEW AND POLICIES**

### 1.1 Introduction

Savings By Design (SBD) is California's nonresidential new construction energy efficiency program, administered statewide and funded by Utility customers through the Public Purpose Programs surcharge applied to gas and electric services.

Participating utilities are:

- Pacific Gas and Electric (PG&E)
- Sacramento Municipal Utility District (SMUD)
- San Diego Gas and Electric (SDG&E)
- Southern California Edison (SCE)
- Los Angeles Department of Water and Power (LADWP)

This statewide approach offers the nonresidential building industry a multi-faceted program designed to consistently serve the needs of the building community throughout California. Savings By Design encourages energy-efficient building design and construction practices, promoting the efficient use of energy by offering up-front design assistance supported by financial incentives based on project performance.

**Benefits of Participation.** Projects participating in Savings By Design may receive services including design assistance, Owners Incentives, Design Team Incentives<sup>1</sup>, and Energy Design Resources. Services begin in the project design phase and continue through construction completion. Design assistance can range from simple plan review and/or efficiency upgrade recommendations to complete computer simulation analysis comparing a number of alternative systems and integrated building design options. Financial incentives, to help offset increased design interaction and potential costs of construction, are available for projects that exceed thresholds established by the program. Participation in the program brings additional benefits, such as reduced long-term operating costs, greater comfort, health and productivity for occupants, and conservation of natural resources and cleaner air due to avoided power generation.

**Designed for Nonresidential New Construction Projects.** Savings By Design targets the primary decision-makers in new construction and renovation/remodel projects: building Owners, developers, architects, engineers, designers, contractors, builders, and energy consultants. Savings By Design analyses provide detailed

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<sup>1</sup> Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory

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technical and financial assistance data that allows Owners and Design Teams to make informed decisions regarding energy efficiency features. The program serves commercial, industrial, and agricultural customers and utilizes the 2013 California Building Energy Efficiency Standards (Title 24, Part 6) as a reference baseline for comparison. The program encourages and moves energy savings within projects to perform better than mandated by Title 24. Other industry standards may be used where appropriate to determine reference baselines for comparisons.

## 1.2 Definitions

Alternative Calculation Method (ACM)	Official method for demonstrating performance compliance with California's Energy Efficiency Standards. The 2013 ACM Approval Manual (Publication CEC-400-2012-006- CMF-REV) is available from the California Energy Commission.
Alternative Delivery Method (ADM)	The ADM delivers the same services available to all customers through Savings By Design. The purpose of the flexible model is to provide a short term, focused offering of SBD services to promote the use of a new energy efficient technology or to cultivate participation from a particular market segment or customer type that may not have participated in the program previously.
Construction Document	Drawings and specifications created by an architect that set forth in detail requirements for the construction of the project.
Design Assistance	Consultative services that assist customers in integrating energy efficient recommendations into the design of their facility. Design assistance includes: integrated design facilitation, energy calculation analysis, life-cycle costing analysis, and other services.
Design Development	The preparation of more detailed drawings and final design plans, showing correct sizes and shapes for rooms. Also included is an outline of the construction specifications, listing the major materials to be used.
Design Team	The group responsible for the design and implementation of the systems in the building that use energy or affect the building's overall energy consumption. The Design Team will generally include the building Owner, project architect, mechanical and electrical engineers, lighting designer, energy consultant, contractor, and possibly others.

Design Team Application	A form submitted by the Design Team Leader to the Utility indicating interest in participating in the Design Team Incentives component of the Savings By Design program.
Design Team Leader	The person who, for purposes of this program, takes the lead in examining and implementing energy efficiency options; specifically, the person who signs the Incentive Agreement and represents the Design Team to the Utility. Generally, this will be the project architect, mechanical engineer, or energy consultant.
Energy Efficiency Report	A document that provides the Utility with a detailed explanation of the Savings by Design project scope and Energy Efficiency measures that the design team has incorporated into the integrated building design. This report contains the contact information of each design team member and incremental costs for each energy efficiency measure type.
Gas Surcharge	An unbundled rate component included on gas customer's bills to fund public purpose programs including energy efficiency, low-income services, and research and development.
Incentive Agreement	An Agreement executed between the program participant and the Utility that documents the estimated electric and gas savings and the estimated incentive amount for the project. Funds are reserved for a period of 48 months upon execution of this Agreement.
Integrated Design	Design practices that consider energy use and financial impacts throughout the design process, involving all Design Team members, to make appropriate decisions. Integrated design calls for the mechanical, architectural and lighting contractors to be synergistic in the building design and electrical layout.
Incremental Cost	The cost that the customer will incur by the design of a building which exceeds current Title 24 standards. Incremental costs are to be provided by measure type (i.e. Lighting, Mechanical and Envelope) and should include hardware, labor, change orders, and engineering costs.

Integrated Design Analysis

A comprehensive analysis that includes energy simulation and financial analysis to quantify the benefits associated with multiple energy efficient options and strategies.

New Construction

For this program, new construction includes any one of the following:

- New building projects wherein no structure or site footprint presently exists
- Addition or expansion of an existing building or site footprint
- Construction that involves complete removal, redesign, and replacement of the energy consuming systems of a building or process
- Projects that require design and selection of new systems based upon the needs of new or modified space function(s)
- Major tenant improvements

Owner	The building Owner and/or developer of a project participating in the Savings By Design program.
Participation Letter/ Letter of Interest	A letter submitted by the Owner or Owner's representative to the Utility showing their interest in participating in the Savings By Design program. This can be a formal letter, email, or documented phone conversation by the Utility.
Project	The scope of work contained in one set of construction documents as submitted for permits
Public Goods Charge (PGC)	A universal charge applied to each electric Utility customer's bill to support the provision of public goods. Public goods covered by California's electric PGC include public purpose energy efficiency programs, low-income services, renewables, and energy-related research and development.
Public Purpose Programs	Savings By Design is a Public Purpose Program, which is managed under the auspices of the California Public Utilities Commission and administered by the participating California gas and electric Utilities. These funds are directed toward a variety of efforts including low-income ratepayer assistance and energy efficiency.
Reference Baseline	Savings By Design uses the California state energy standard (Title 24 and Title 20) as a reference baseline, a benchmark from which energy savings are determined. If the ACM baseline does not accurately reflect design changes or technological advances, the Utility representative reserves the right to use a "standard practice compliant building" approach or similar baseline adjustment. Where energy standards are not applicable, but substantial energy savings are feasible, a standard practice baseline will be used. An experienced Utility engineer will determine or approve the appropriate baseline to be applied to such a building project and or process.
SBD Representative	The Utility representative responsible for establishing, facilitating, and maintaining the relationship between the Utility, the Owner, and the Design Team for the purpose of achieving the benefits of the program.

Schematic Design	The preparation of studies to ascertain the requirements of the project, consisting of drawings and other documents illustrating the scale and relationships of the project components for approval by the Owner. The architect also submits to the Owner a preliminary estimate of construction costs based on current area, volume, or other unit costs
Time Dependent Valuation	TDV, as the name implies, values energy differently depending on the time it is used. This means that electricity saved on a hot summer afternoon will be worth more in the compliance process than the same amount of electricity saved on a winter morning. The value assigned to energy savings through TDV more closely reflects the market for electricity, gas, propane and other energy sources and provides incentives for measures, such as thermal storage or daylighting, that are more effective during peak periods.
Title 20	California Code of Regulations relating to appliance efficiency. It is also known as the Appliance Energy Efficiency Standards. Title 20 sets minimum efficiency requirements for appliances, such as package-units, exit signs, and other building elements in the state of California.
Title 24	California Code of Regulations relating to building design and construction. Part 6 of Title 24 is the Energy Efficiency Standards for Nonresidential Buildings. Title 24 sets minimum efficiency requirements for building construction materials and energy-consuming equipment in the state of California.
Warm Shell	In “warm shell” projects, the building envelope, central mechanical system, and core lighting systems are included in the design and Title 24 documentation. Future build out work or tenant improvements are typically permitted separately.
Utility	California electric and gas utilities who have chosen to participate in Savings By Design: Pacific Gas and Electric (PG&E), Sacramento Municipal Utility District (SMUD), San Diego Gas and Electric (SDG&E), Southern California Edison (SCE), and Southern California Gas (SoCalGas).-

### 1.3 General Requirements and Eligibility

#### To be eligible for Savings By Design, projects must be:

- At a point where design changes are feasible, preferably in the conceptual or schematic design phase.
- Located in the service territory of a participating Utility and subject to payment of Public Goods Charge (PGC) for electric service and/or the gas surcharge for gas service.
- Within the definition of new construction.

### 1.4 The Basic Process<sup>2</sup>

1. Owners, architects, designers, engineers, contractors, or other project representatives initiate contact with a SBD Representative (or vice versa).
2. Once contact has been made, Owner submits a completed Participation Letter, Letter of Interest, or Program Application (using the appropriate form(s) provided by the Utility) indicating their interest in the program. When applicable, the Design Team must complete a Design Team Application during the conceptual or schematic design phase to establish their interest in participating, which will be reviewed and approved by the Utility.
3. A SBD Representative will hold a kickoff meeting with the Owner and the Design Team to confirm that design changes are feasible and explain the program's policies and procedures. Projects with a substantially complete design may be required to implement additional energy efficiency enhancements to receive an incentive, unless documentation exists that the utility has previously collaborated with the owner or design team
4. A SBD Representative will work with participants to determine which program path (Whole Building Approach or Systems Approach), if any, applies and how to optimize the energy efficiency of the project. Specific design assistance services will depend on the program path selected.
5. After the selection and design of the recommended energy efficiency enhancements are finalized, Owner or Design Team submits plans, Title 24 compliance calculations, incremental costs, and other design documents to the SBD representative for utility review. Title 24 compliance calculations must include "proposed operating schedules" and be able to analyzed in "non-compliance" parametric runs.
6. The SBD Representative reviews and approves the project and issues an Incentive Agreement to the Owner/Design Team<sup>3</sup> delineating the proposed project details, estimated incentive amounts, and terms and conditions.

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<sup>2</sup> For a schematic of the Savings By Design Process, see *Chart 1: Savings By Design Process* on page 12.

<sup>3</sup> Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory

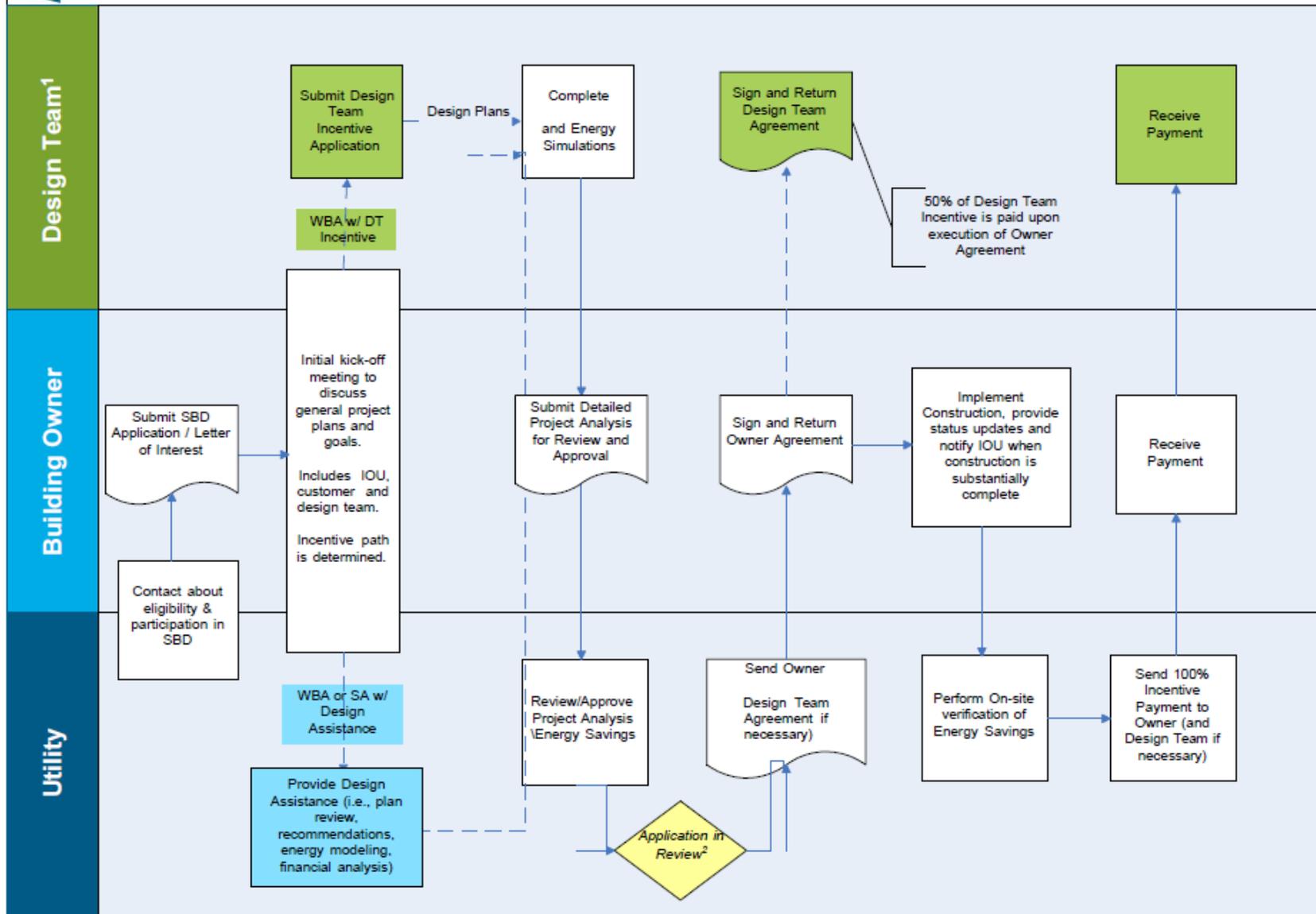
7. The Owner signs, dates, and returns the Agreement to the SBD Representative. By signing the Agreement, the Owner acknowledges that they have read and agree to all program eligibility requirements. The Utility's counter-signature and date indicate funds have been reserved for the project for a period of up to 48 months. Program funding is "first-come, first-served." Owner must agree that they will not apply for or receive any other incentive offered by local or state entities or utilities for measures covered under Savings By Design.
8. Once construction is substantially complete, the Owner or Owner's representative must submit all as built documents to the SBD Representative and request an on-site verification.
9. Allow access to the completed facility for on-site verification and, if selected, participate in measurement and evaluation studies. SBD Representative may request integrated design analysis reports, manufacturer's specifications, equipment cut sheets, and incremental cost verification to verify completed project matches the design proposed in the Agreement.

If the project is built as agreed and the project meets all program requirements, the incentive will be paid. If the completed design differs from that outlined in the Incentive Agreement, the incentive may be adjusted to reflect the revised, estimated building performance. If installation of the agreed-upon energy efficient equipment is initiated prior to Utility's execution of the Agreement, the Utility or the CPUC Energy Division may disqualify the project. Exceptions to the above process may be made at Utility's discretion on a case-by-case basis.

Construction must be substantially complete and program participants must submit all required documentation to the Utility within 48 months from the date of the Utility's execution of the Incentive Agreement. If the project's completion is delayed beyond the final date, the Agreement may be voided; if voided, the project may be eligible to reapply under the program guidelines in effect at that time. Subsequent eligibility would be considered on a case-by-case basis and would require Utility approval and execution of a new Incentive Agreement. At the Utility's discretion, the original contract may be modified to allow for the completion of construction.

Funding is limited and available on a first-come, first-served basis. The Utility reserves the right to modify or discontinue this program without prior notice at its discretion, or by order of the California Public Utilities Commission (CPUC). Projects are subject to CPUC Energy Division approval, which can place execution of Incentive Agreements, on indefinite hold.

# Chart 1: Savings By Design Process



<sup>1</sup> Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory.  
<sup>2</sup>Projects are subject to CPUC Energy Division approval, which can place execution of Incentive Agreements on indefinite hold.

WBA – Whole Building Approach SA – Systems Approach DT – Design Team  
 - - - - - Optional Process Dependent on Incentive path

## **2 TWO PROGRAM APPROACHES TO ENERGY EFFICIENT BUILDINGS**

Two design approaches - the Whole Building Approach and the Systems Approach - are available to identify and quantify energy-efficient design improvements. The approaches provide the flexibility required to serve a large range of nonresidential projects, regardless of the approach taken, all services are available. After discussing project specifics, the SBD Representative will help select the most advantageous approach based on the scope, phase, and goals of the project.

### **2.1 Whole Building Approach**

Savings By Design promotes the use of integrated design analyses through the Whole Building Approach for large, complex projects or for projects containing innovative energy design features. Analyzing the performance of the building as a whole improves the Design Team's ability to optimize interactive efficiency effects of the various building systems. Whole Building Approach (WBA) projects must incorporate envelope, mechanical systems and lighting into the energy efficiency measures and when combined exceed Title 24 by 10% or greater.

Program participation requires a minimal commitment from the building Owner: that he or she is willing to consider the analysis recommendations, attend a meeting with the Design Team to discuss the viability of implementing various energy efficiency strategies, and sign the Owner Agreement offered by the SBD Representative.

*Calculation Methodology:* Whole Building Approach analysis requires the use of a comprehensive energy simulation tool capable of hourly calculations of multiple thermal zones, and must include proposed operating schedules. The tool must be capable of modeling Title 24/Alternative Calculation Method (ACM) requirements as well as the requirements of the proposed design where they differ significantly from Title 24, and must be approved by the Utility. Parametric and economic analyses may also be included in Whole Building Approach studies.

Software packages used for Title 24 compliance are generally acceptable; however, those modeling tools may not always be capable of modeling the installed systems. For those cases, the design team may request the Utility to pre-approve a different calculation tool, which the Utility may accept on a case-by-case basis.

*Optional "standard practice minimally compliant building" approach:* Buildings with advanced mechanical or envelope systems have the option of modeling a "minimally compliant building" to establish the Title 24 baseline. The standard practice minimally compliant building must have the same envelope, geometry and orientation as the "proposed" building, but may be modeled with any mechanical system that permits compliance with Title 24. Approval of your SBD representative is required prior to using this approach.

*Customers using prototypical designs:* Customers with multiple locations throughout

the state who use a standard design prototype for multiple projects may be eligible for all services offered through the Whole Building Approach for the initial project in California. All subsequent projects constructed using that design will be eligible for the System Approach incentives only, and will not be eligible for Design Team Incentives. If there are significant revisions to the standard design, the new design effort may be eligible for all services.

## **2.2 Systems Approach**

The Systems Approach encourages designers to optimize the energy efficiency of the systems within a building. The System Approach is most appropriate for less complex projects, those whose systems are designed at different times, and/or for projects where consideration for energy efficiency occurs late in the design phase. For common building types and system features, Savings By Design provides this straightforward approach to identify potential energy efficiency options and impacts. The SBD Representative utilizes a simple, performance-based modeling tool to quickly estimate typical energy savings associated with recommended measures in a typical building, and to calculate corresponding incentives. Systems Approach projects involve 1-2 of the Integrated Design measures of Envelope, Lighting and/or Mechanical.

Projects committed under the Whole Building Approach that do not modify all three Integrated Design measures listed above may be processed through the Systems Approach at the Utility's discretion. Such projects may have incentives and savings recalculated under the current Systems Approach.

*Calculation Methodology:* A typical Systems Approach project uses a simplified modeling tool with the assistance of the SBD Representative. Each system needs to exceed current Title 24 by 10% or greater.

### **3 PROGRAM COMPONENTS**

Savings By Design provides a variety of offerings to encourage the design of energy efficient buildings. The program offers design assistance on a project-appropriate level as well as financial incentives to both the building Owner and the Design Team.

#### **3.1 Design Assistance**

Design assistance and consulting is offered at no charge to the Owner or the Design Team. The level of assistance provided for a project varies based on the program approach—Whole Building or Systems. Assistance may be as simple as providing plan review and recommendations or may be as involved as full energy modeling with financial analysis on multiple options for energy efficient systems. Receiving design assistance does not obligate the Owner to implement the design recommendations.

#### **3.2 Financial Incentives**

The program offers financial assistance to help offset what may be perceived as the increased costs associated with energy efficient buildings. Owner and Design Team Incentives<sup>4</sup> are based upon the project's estimated annual energy and demand savings (kW, kWh and therms) and are calculated according to the rates and program entry levels shown in Tables 1 and 2 in *Section 4: Tables and Figures*. Incentives are limited to 75% of the incremental cost of the efficiency upgrades.

Incentive payments are issued after construction completion is verified and when all other required documentation has been received. The final incentive amount is calculated based on the installed features. Final incentive payments may vary from agreed upon (committed) estimates as a result of changes

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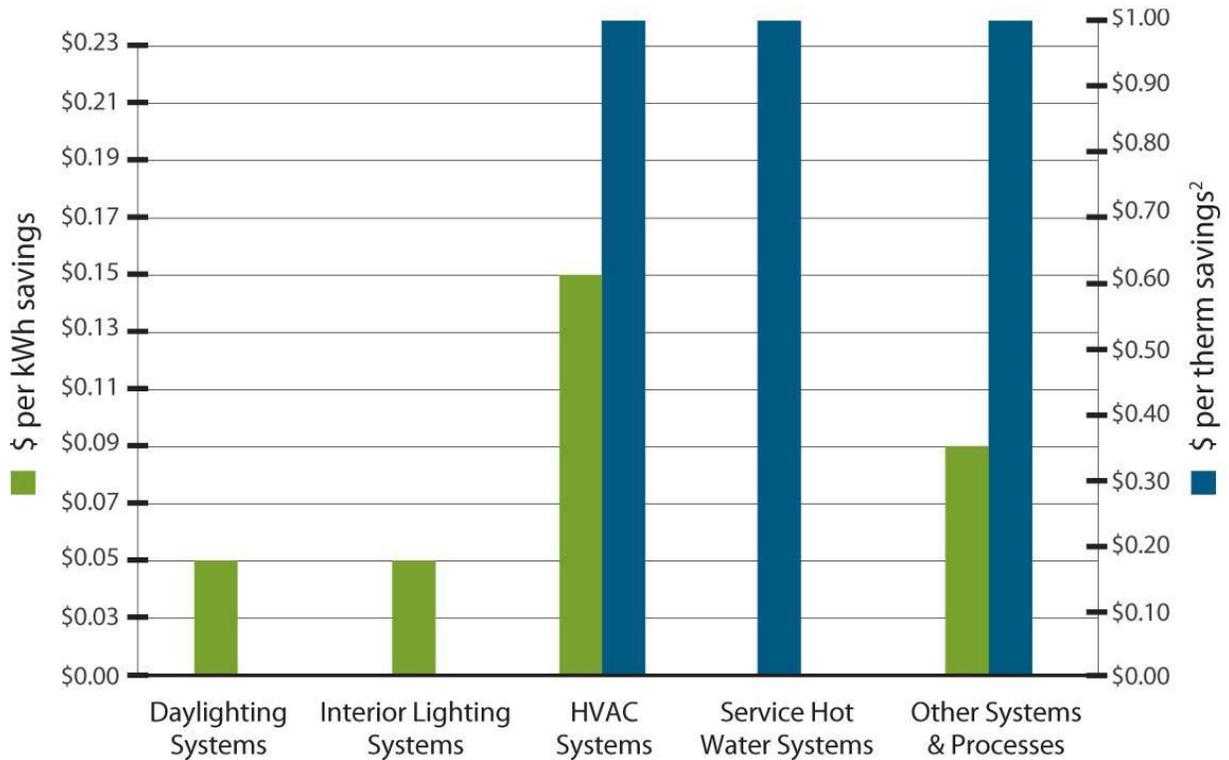
<sup>4</sup> Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory

in the design or installation of additional energy efficiency measures.

**Systems Approach incentives are calculated using a flat incentive rate (\$/kW, \$/therm) for Systems Approach projects. (See Figure 1: Systems Approach incentive rates)**

Systems Approach projects are eligible for an incentive based on peak demand reduction. (See Figure 1: Systems Approach incentive rates)

**Figure 1: Systems Approach incentive rates**



Note: Projects will also receive \$100 per peak KW saved for all measures, subject to all applicable caps.

<sup>2</sup>SCE therms incentive, offered in partnership with SCGC.

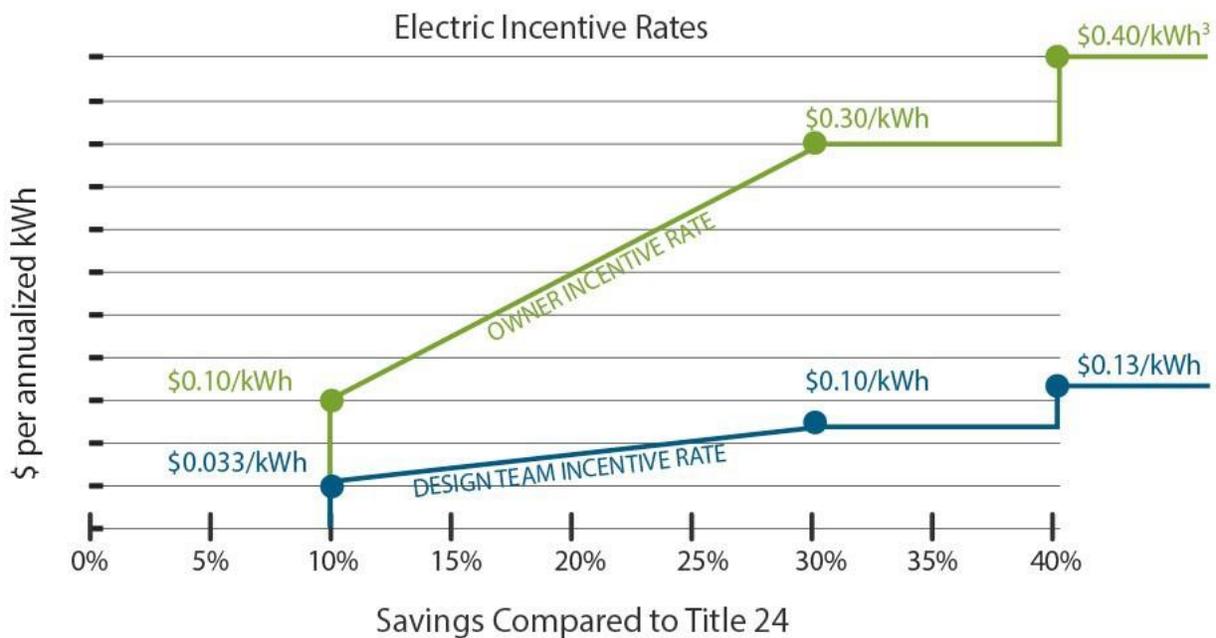
**Whole Building Approach incentives.** The annual energy savings is calculated by an ACM compliant modeling tool to determine the % better than Title 24. For projects falling between 10% and 30% better than Title 24, the kWh incentive rate is on a sliding scale and is equal to the “% better than title 24”. For projects 40% better than Title 24, the kWh incentive rate is equal to the “40% better than Title 24”. The Therm Incentive and Peak Demand Incentives are both flat rates. (See Figure 2). The minimum program requirement is for the project to exceed Title 24 by 10% or greater.

Whole Building Approach projects are eligible for an incentive based on peak demand reduction. (See Figure 2: Whole Building Approach incentive rates)

**Figure 2: Whole Building Approach incentive rates**

Owner Whole Building Incentives - up to \$150,000  
 - 10% Bonus for end use monitoring

Design Team Whole Building Incentives - up to \$50,000<sup>1</sup>



Peak Demand Incentive Rates: \$100/kW Owner      \$33/kW Design Team<sup>1</sup>  
<sup>2</sup>Therm Incentive Rate: \$1.00/therm Owner      \$0.33/therm Design Team<sup>1</sup>

<sup>1</sup>Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory.

<sup>2</sup>SCE therms incentive, offered in partnership with SCGC.

<sup>3</sup>Not available in PG&E service territory

**Design Team Incentives<sup>5</sup>.** Incentives are paid to a Design Team leader who submits a Design Team application early in the design process. Design Team Incentives are only available for Whole Building Approach projects, subject to an Owner Incentive Agreement being signed, and are paid to the Design Team Leader.

### **Requirements and Features of the Design Team Incentive**

- The Design Team Leader must submit a Design Team Incentive Application early in the design process.
- The proposed project's energy consumption must be at least 10% below the reference baseline.
- The Owner must complete the whole-building Owner Agreement.
- The Design Team shall supply the SBD representative with an Energy Efficiency Report summarizing the baseline case and proposed case. The electronic files containing the energy simulation, construction documents, and incremental cost estimates must also be submitted. Your SBD representative will provide the reporting requirements of the Design Team Incentive.
- 50% of the Design Team Incentive will be paid upon the Utility's acceptance of the Owner's Agreement and Design Team Agreement. The balance of the Design Team Incentive is to be paid upon project completion.

**End Use Monitoring Incentive.** Projects that design for and install end-use metering equipment able to monitor and record lighting, HVAC, process and plug loads separately are eligible for an incentive calculated as 10% of the Owner's incentive. Projects applying for the End Use Monitoring Incentive shall submit an End Use Monitoring Plan describing how the metering equipment will be installed and operated. Post M&V is not required for Savings by Design projects. The utility may request M&V data at some date after occupancy to insure that the building is operating within the parameters of the design. The findings of this data will not affect any incentives previously awarded per the agreement.

### **Requirements for End Use Monitoring**

- **Design documents, reports and/or invoices that reflect the end use metering installation and connection to the EMS system**
- **Screenshot that shows the meters are connected to the EMS**

### **3.3 Energy Design Resources**

The Savings By Design program maintains Energy Design Resources, a suite of energy efficiency design products to support architects, engineers and developers with the integration of more complex equipment and designs.

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<sup>5</sup>*Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory*

The contents of [www.energydesignresources.com](http://www.energydesignresources.com) are available free of charge, and include:

- Design Briefs and Case Histories
- Energy Design Software
- Training and Workshops

#### 4 TABLES AND FIGURES

**Table 1: Systems Approach Incentive Rates and Entry Levels<sup>1</sup>**

Program Approach and System Categories	Entry Levels (% below T24)	Incentive	Maximum Incentive Per Project <sup>2</sup>
<b>Systems Approach</b>			
Lighting/Daylighting Systems	See program brochure for specific thresholds and requirements	\$0.05 / kWh \$100.00 / peak kW	\$150,000
HVAC Systems Refrigeration		\$0.15 / kWh \$1.00 / therm \$100.00 / peak kW	
Envelope Measures		\$0.15 / kWh \$100.00 / peak kW	
Service Hot Water Systems		\$1.00 / therm	
Other Systems and Processes <sup>2</sup>		\$0.09 / kWh \$1.00 / therm \$100.00 / peak kW	

<sup>1</sup> Unique building types and/or processes may receive a package of services and incentives that may differ from the Handbook guidelines when we elect to use an alternative delivery method (ADM).

<sup>2</sup> Incentives are limited to 75% of the incremental costs associated with efficiency upgrades. Incentives are limited to 15% of the applicable Utility's incentive budget available in the year of project completion. Incentive maximums may vary on a case-by-case basis for select projects; contact applicable Utility for limits.

**Table 2: Whole Building Incentive Rates and Entry Levels<sup>1</sup>**

Incentive Type	Entry Levels (% Below T24)	Incentive	Maximum Incentive Per Project <sup>2</sup>
<b>Whole Building Approach</b>			
<b>Incentives paid to the Owner/Developer:</b>			
Owner Incentive	10%	\$0.10 - \$0.30 & \$0.40/kWh, \$1.00/therm, + \$100.00 / peak kW	\$150,000
End Use Monitoring Incentive	10%	10% of Owner Incentive	N/A
<b>Incentives paid to the Design Team Leader:</b>			
Design Team Incentive <sup>5</sup>	10% <sup>3</sup>	1/3 of Owner Incentive <sup>4</sup>	\$50,000
<sup>1</sup> Unique building types and/or processes may receive a package of services and incentives that may differ from the Handbook guidelines when we elect to use an alternative delivery method (ADM).			
<sup>2</sup> Incentives are limited to 75% of the incremental costs associated with efficiency upgrades. Incentives are limited to 15% of the applicable utilities' incentive budget available in the year of project completion. Incentive maximums may vary on a case-by-case basis for select projects; contact applicable Utility for limits.			
<sup>3</sup> Half of the Design Team Incentive is payable upon receipt of a signed Owner's Agreement.			
<sup>4</sup> Design Team Incentive calculations do not include End Use Monitoring incentives.			
<sup>5</sup> Design Team Assistance to be offered in lieu of Design Team Incentives in SDG&E service territory			