DOCKETED		
Docket Number:	23-DECARB-01	
Project Title:	Inflation Reduction Act Residential Energy Rebate Programs	
TN #:	260770	
Document Title:	HEEHRA Phase II RFI Workshop Presentation	
Description:	on: Presentation from the December 18, 2024 HEEHRA Phase II Request for Information Workshop.	
Filer:	Amber Beck	
Organization:	California Energy Commission	
Submitter Role:	Commission Staff	
Submission Date:	12/20/2024 3:57:27 PM	
Docketed Date:	12/20/2024	



Home Electrification and Appliance Rebates Program- Phase II Request for Information

CEC Staff

December 18, 2024



- 1. Today's workshop is being recorded
- 2. All presentations will be posted to the CEC website
- 3. CEC welcomes and encourages written comments and supporting documentation
- 4. Zoom issues?

Contact Zoom at (888) 799-9666 ext. 2, or the CEC Public Advisor at <u>publicadvisor@energy.ca.gov</u> or by phone at (916) 957-7910

How to Comment & Connect

During Today's Workshop

During Presentations

• Use Zoom Q&A feature

During Public Comment Period

- Use Zoom raise hand
- On phone, press *9 to raise hand and *6 to (un)mute
- When called upon, unmute, say and spell your name, state your affiliation, and make your comment.

After Today's Workshop

- Visit <u>CEC IRA webpage</u> at https://www.energy.ca.gov/programs-andtopics/programs/inflation-reduction-actresidential-energy-rebate-programs
- Docket: 23-DECARB-01
- IRAresidentialenergyrebates@energy.ca.gov



- **1. Welcome and Introduction**
- 2. Panel 1: HEEHRA (HEAR) Program Overview and Eligible Measures
 - Public Comment
- 3. Panel 2: Experiences and Lessons Learned from Other States
 - Public Comment
- 4. Panel 3: Point of Sale Programs
 - Public Comment
- 5. Closing Remarks and Adjourn



Welcome Remarks

Jennifer Nelson, Deputy Director

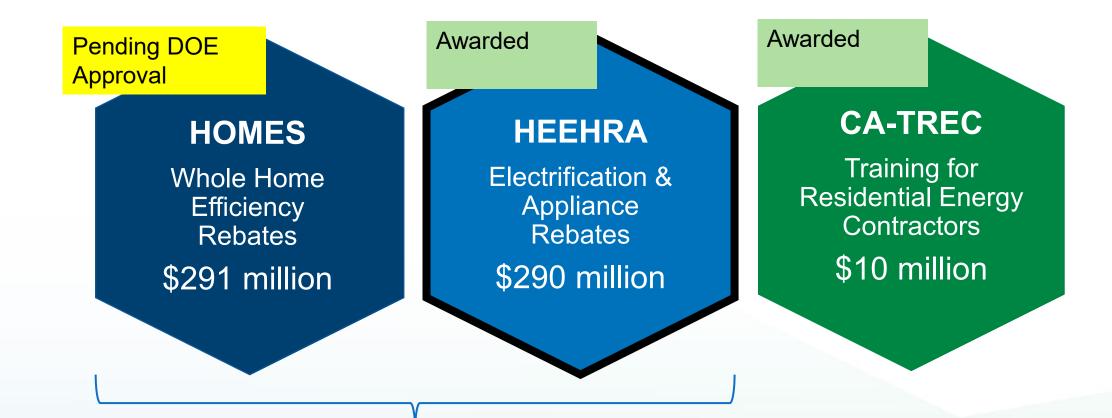
Reliability Renewable Energy & Decarbonization Incentives (RREDI) Division, CEC



HEEHRA (HEAR) Program Overview & Eligible Measures

Carlos Ortiz, CEC Laila Atalla, Senior Associate, RMI





Home Energy Rebate Programs

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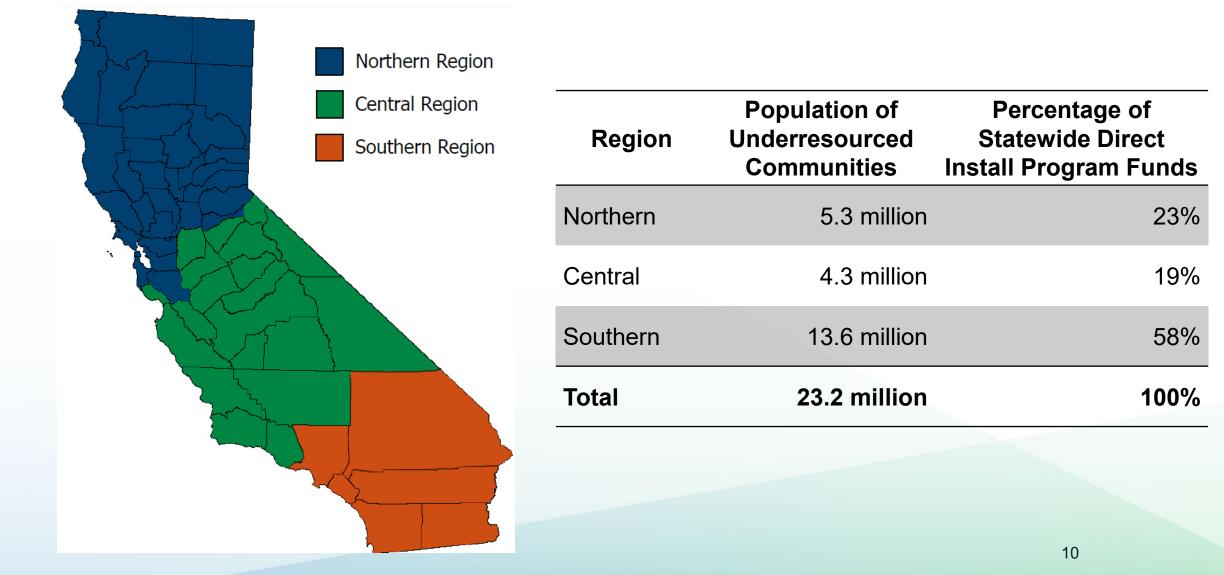


Statewide	Efficient electric equipment	Existing single and multifamily homes
Low- to moderate- income residents	HEEHRA equity funding allocation: 41% low-income 10% low-income multifamily	HEEHRA-Tech Clean California Contractors

HEEHRA Phase I \$80M Rebates by Building Type & Income Level

Single-Family	Rebate Amount
Low- Income: Heat Pump for Space Heating or Cooling (HP HVAC) (<80% AMI)	\$8,000
Moderate-Income: Heat Pump for Space Heating or Cooling (HP HVAC) (80%-150% AMI)	\$4,000
Multifamily – Low-to-moderate income	
Heat Pump for Space Heating or Cooling (HP HVAC)	\$7,500
Heat Pump for Space Heating or Cooling – Variable Speed (HP HVAC)	\$8,000
Heat Pump Water Heater (Electric to Electric HP, cannot replace existing HP)	\$700
In-Unit Heat Pump Water Heater	\$1,750
Central Heat Pump Water Heater*	\$1,750 (per unit served)
Electric Load Service Center*	\$4,000
Electric Wiring*	\$2,500
Electric Stove, Cooktop, Range, or Oven	\$840
Heat Pump Clothes Dryer	\$840

Regional Funding Allocation





RFI topics:

- 1. Eligible Equipment and Appliance Rebates
- 2. Regional Allocation and Customer Engagement
- 3. Contractor Engagement and Support
- 4. Point-of-Sale Methodologies
- 5. Do-it-Yourself (DIY) Considerations
- 6. Recycling Appliances and Refrigerants



Equipment or Appliance per Household	DOE Low-Income Maximum Rebate (Up to 80 percent AMI)	DOE Moderate-Income Maximum Rebate (80-150 percent AMI)
Heat pump for space heating and cooling	\$8,000	\$4,000
Heat pump water heater	\$1,750	\$875
Electric stove, electric cooktop, or electric range	\$840	\$420
Heat pump clothes dryer	\$840	\$420
Electrical panel	\$4,000	\$2,000
Insulation, air sealing, ventilation	\$1,600	\$800
Electric wiring	\$2,500	\$1,250
Maximum rebates per household	\$14,000	\$7,000

*Currently under CEC consideration



<u>CEC IRA Webpage</u>

- <u>https://www.energy.ca.gov/programs-and-topics/programs/inflation-reduction-act-residential-energy-rebate-programs</u>
- IRA FAQ
 - https://www.energy.ca.gov/programs-and-topics/programs/inflationreduction-act-residential-energy-rebate-programs/faq-ira
- <u>TECH Clean California</u>
 - https://techcleanca.com/



Maximizing Home Energy Upgrade Incentives in California

December 2024



Ways to Combine Incentives

Co-funding Multiple funds for a single measure

Braiding

Multiple funds for a project, one fund per measure

Stacking or Layering

Ways to Combine Incentives

Co-Funding (single measure)



Weatherization Assistance Program Home Electrification and Appliance Rebate

Ratepayer-funded program

TECH Clean California

Regional or local program

Braiding

(two or more measures)





Which Federal Funds can Stack?

	Home Energy Rebates	IRA Tax Credits	Federal Grants	Federal Loans
Home Energy Rebates	Braid	Co-fund or braid	Braid	Co-fund or braid
IRA Tax Credits		Braid	Co-fund or braid	Co-fund or braid
Federal Grants			Depends on grant	Co-fund or braid
Federal Loans				Co-fund or braid

These are high-level takeaways. Check federal guidance for nuanced guidance on stacking.

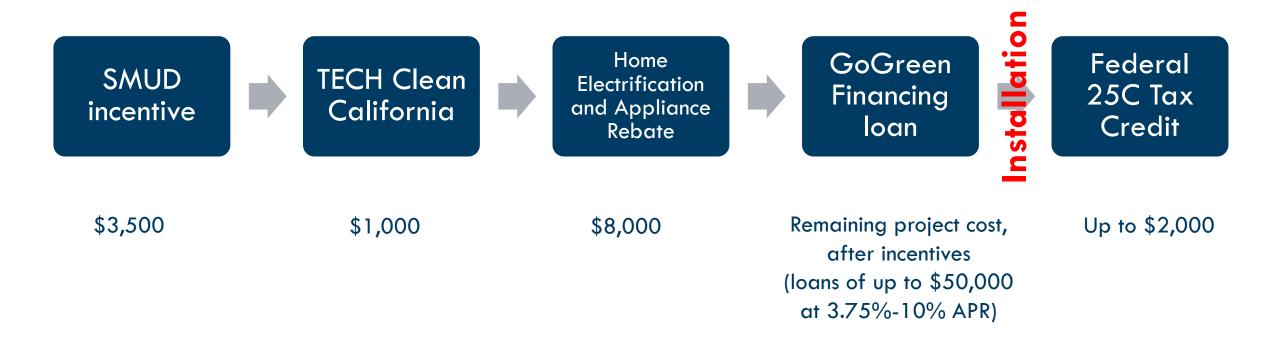
RMI – Energy. Transformed.

Maximizing Federal, State, Utility, and Regional Incentives for an Air Source Heat Pump



Example: Air source heat pump for single-family, middle-income household in San Rafael

Maximizing Federal, State, Utility, and Regional Incentives for an Air Source Heat Pump



Example: Air source heat pump for single-family, middle-income household in Sacramento

Maximizing Federal, State, Utility, and Regional Incentives for a Heat Pump Water Heater

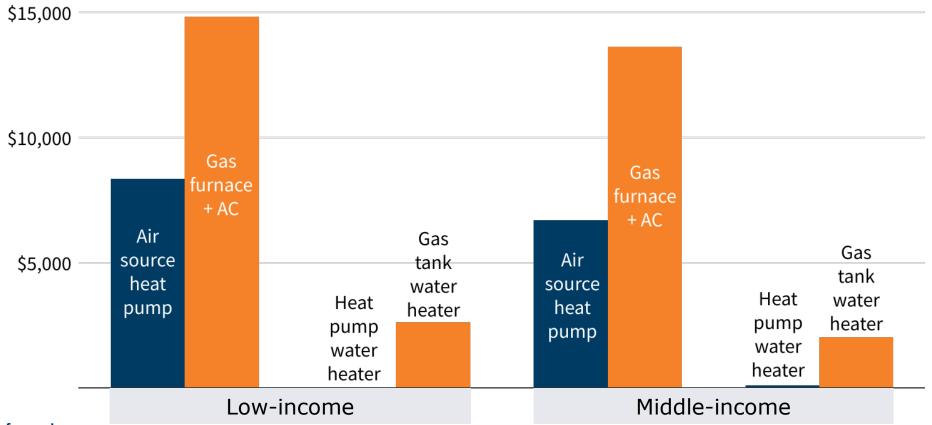


Example: Heat pump water heater for single-family, low-income household in Fresno

RMI – Energy. Transformed.

Maximizing Incentives Makes Clean Energy Retrofits More Affordable Upfront

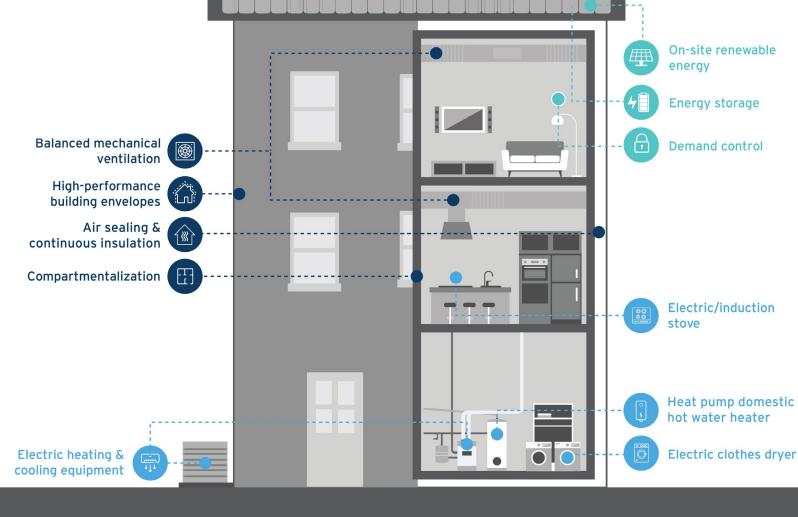
Average cost of home energy upgrades for CA households after maximum incentives are applied



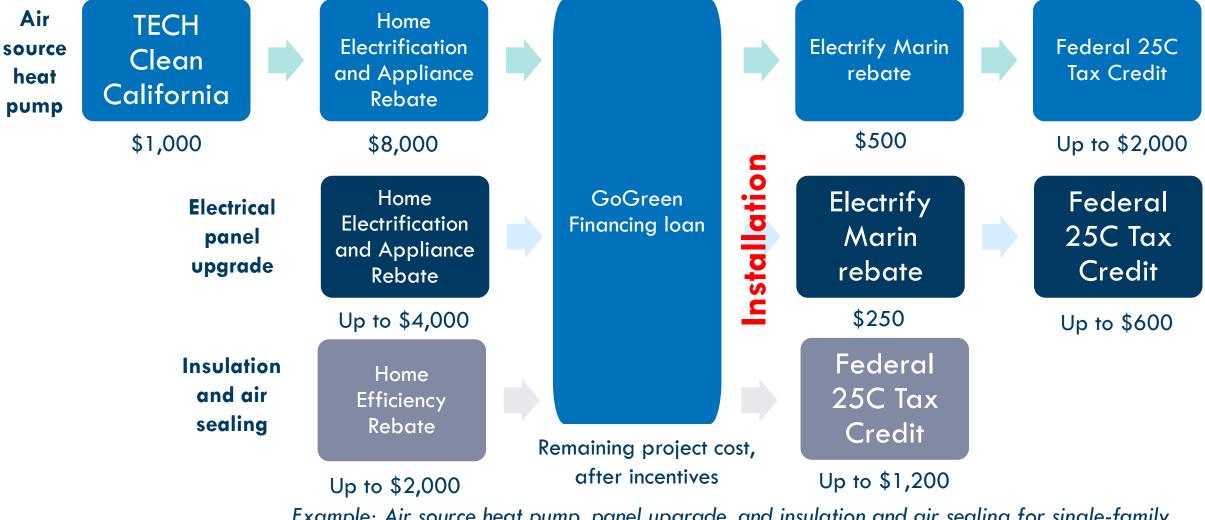
RMI – Energy. Transformed.

RMI analysis based on incentives as of December 2024; averaged across 10 CA locations

Braiding Incentives Enables Holistic Home Retrofits



Braiding Federal, State, Utility, and Regional Incentives for Multiple Measures



RMI – Energy. Transformed.

Example: Air source heat pump, panel upgrade, and insulation and air sealing for single-family, middle-income household in San Rafael

Priorities for Incentive Stacking Support

Increase access to incentives

Streamline application process

- Target regions with limited utility/local incentives
- Target low-income retrofits without federal 25C tax credits
- Target renters and multifamily housing

- Consolidate applications
- Provide technical assistance
- Align performance standards and income requirements across programs

Thank you

Laila Atalla latalla@rmi.org

<u>rmi.org/our-work/buildings</u> <u>rmi.org/incentive-stacking-resources-for-clean-buildings</u>

RMI – Energy. Transformed.



Instruction

- 2 minutes or less per person
- 1 representative per organization

Zoom App/Online

Click "raise hand"

Telephone

- Press *9 to raise hand
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When called upon

- Public Advisor will open your line
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For Phone Participation: Dial (669) 219-2599 or (888) 475-4499 Enter Webinar ID: 846 9759 6010 and Passcode 105746

2-MINUTE TIMER





Panel 2: Experiences and Lessons Learned from Other States

Jake Bartell, CEC





Mia Lombardi Electrification Program Lead, Department of Energy (DOE)



Yeny Maestas

HER/HEAR Program Manager, New Mexico Energy Conservation and Management



Ryan Moore & Nicole Munz

Sr. Project Manager, New York State Energy Research & Development Authority

Home Energy Rebates Program CEC HEEHRA Phase II Workshop

Mia Lombardi, Electrification Program Lead December 18, 2024





HOME ENERGY REBATE PROGRAM OBJECTIVES

- Help households across the US enjoy lower energy bills and more comfortable homes
- Make it easier to access and implement residential energy improvements
- Attract and retain qualified workforce to serve both single and multifamily markets
- Spur durable market demand for residential efficiency and electrification by demonstrating value of energy upgrades and efficient homes to homeowners, tenants, and investors



HOME ELECTRIFICATION & APPLIANCE REBATES (HEEHRA/HEAR)

- Products must be ENERGY STAR certified, where applicable
- Rebates can be made available for installations in single family homes/multifamily buildings:
 - As part of new construction
 - To replace an existing non-electric appliance
 - As a first-time purchase with respect to that appliance
- Rebates are income-based and available to households at:
 - Up to 100% of total project cost for < 80% AMI
 - Up to 50% of total project cost for 80-150% AMI
- Total rebates for an eligible entity capped at \$14,000 per housing unit
- Rebates may be offered at the point-of-purchase (via state qualified retailers or distributors) or point-of-installation (via state qualified contractors)
- Installation incentives can be made available to qualified contractors

Eligible Products	Maximum Amount
Heat Pump Water Heater	\$1,750
Heat Pump for Space Heating and Cooling	\$8,000
Heat Pump Clothes Dryer	\$840
Electric Stove, Cooktop, Range, or Oven	\$840
Insulation, Air Sealing, and Ventilation	\$1,600
Electric Load Service Center Upgrade	\$4,000
Electric Wiring	\$2,500



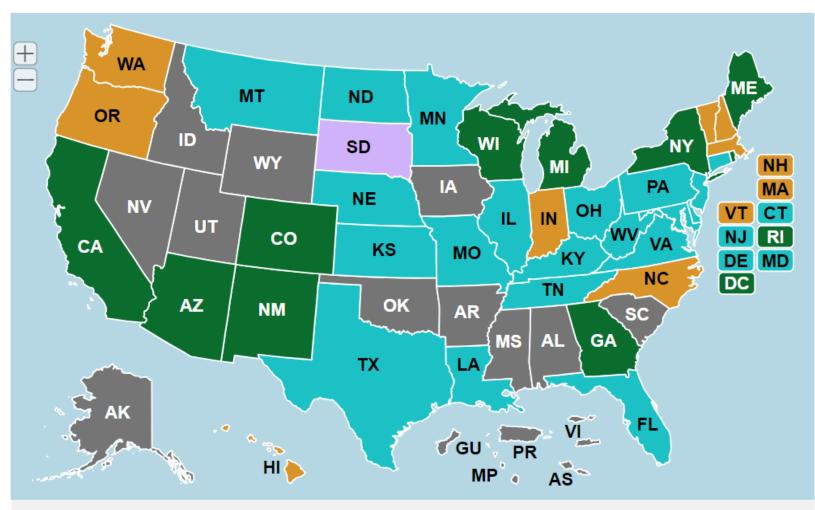
PROGRAM DESIGN FLEXIBILITY

As long as all federal program requirements are satisfied, states can customize offers in ways that meet the needs of their individual state, including by focusing on certain:





HOME ENERGY REBATES PROGRAM TRACKER



Not Participating Preparing Applications Application Submitted Application Approved Rebates Available



Last Updated on December 10, 2024

Office of State and Community Energy Programs



Thank You

New Mexico Inflation Reduction Act Home Energy Rebates Program

State of New Mexico Energy Conservation and Management Home Electrification and Appliance Rebates Program (50122) December 18, 2024 Yeny Maestas

Program Manager





Home Energy Rebates Programs Overview

- NM is focusing on single family homes that earn less than 80% AMI
- For the multifamily home implementation, NM is considering up to 150% AMI
- NM created a brand-new application portal that is connected to the PNNL API by partnering with Real Time Solutions, a local software developer out of Albuquerque, NM
- NM is working on creating a one-stop-shop for all things energy in the state
- NM is creating a brand-new group of energy navigators called "energy coaches" that help regular New Mexicans navigate the complicated world of energy efficiency programs



Energy, Minerals and Natural Resources Department

MEXICO

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Home Electrification and Appliance Rebates (HEAR) Program Point-of-Sale Launch

Approximate allocation for NM HER Program ~ \$43.7M

- NM is the first state to implement a point-of-sale coupon with retailers
- NM launched with DIY insulation
- Program expected to last four years from launch
- Franklin Energy is the implementer for the single-family program
- ICAST is the implementer for multifamily program
- Real Time Solution is the application developer





HEAR Program phased approach

NM is following a phased approach:

- 1. NM launched DIY point-of-sale coupons for insulation (\$1,600) on September 3, 2024
- 2. Launched with Point-of-Sale cooktops and clothes dryers (\$840) on Black Friday 2024, including a gas capping component and electrical upgrades
- 3. NM is working with implementer to train and certify contractors to do installations for the rest of the measures that are not DIY
- 4. NM is currently working on adding additional retailers including local mom-and-pop
- 5. Because NM is so rural, coupons are valid in states that border NM for a better user experience
- 6. This is a collaborative effort between the State of New Mexico, retailers, Franklin Energy, Real Time Solutions, Department of Energy and PNNL.



How does it work?

Right now, it's a somewhat manual processing, that will get easier as retailers connect to the PNNL API:

- 1. Retailer signs agreement with Implementer and develops a Qualifying Products List (QPL)
- 2. Retailed feeds a batch of coupons to RTS.
- 3. Once an applicant qualifies, the system generates at coupon for their chosen measure and retailer and, at the same time, generates a reservation with the PNNL API.
- 4. Customer Redeems Coupon
- 5. Customer submits geotagged photo of their installed appliance.
- 6. Retailer redeems their redemption report.
- 7. Retailer gets paid.
- 8. Project is completed.

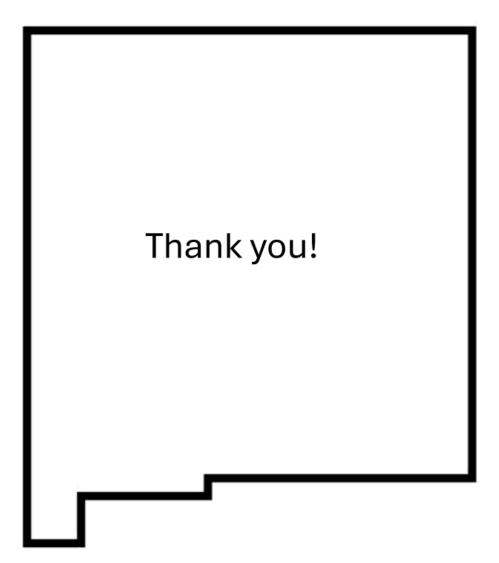


Lessons learned

Right now, it's a somewhat manual processing, that will get easier as retailers connect to the PNNL API:

- 1. When in doubt, call you Project Officer at DOE;
- 2. Allocate time prior to launch so retailers have time to train their sales associates;
- 3. Be aware of supply/stocking issues in your state;
- 4. Be aware that the QPL is fluid and needs constant updating;
- 5. Consider people who do no have smart phones or internet access.

Red or Green? The correct answer is Christmas.





Appliance Upgrade Program (AUP)

Ryan Moore and Nicole MunzDecember 18, 2024Home Electrification and Appliance Rebates (HEAR)



Appliance Upgrade Program Overview

Retail point-of-sale program launched in October 2024 in the new MyEnergy Portal

- Customers below 150% AMI are eligible to receive rebates
- Rebates available for:
 - ENERGY STAR® certified heat pump clothes dryers (including all-in-one washer-dryers with a heat pump dryer)
 - **Electrical wiring** and **panel upgrades** (if necessary for the appliance installation)
- NYSERDA is currently recruiting retailers and contractors through <u>PON 5859</u>: Application for Retailer and Contractor Enrollment



Appliance Upgrade Program Eligible Measures, Rebate, and Incentive Amounts

Customer Rebate Amounts:

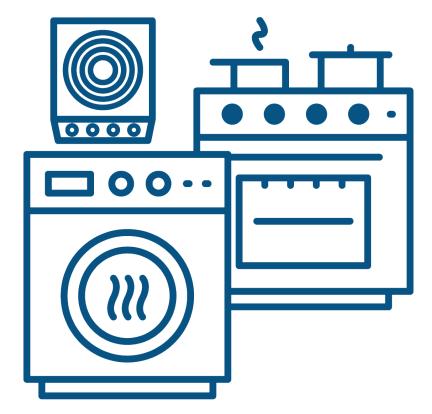
Measure Type	Rebate Amount Per Dwelling Unit	80-150% AMI	<80% AMI
Heat Pump Clothes	\$840	50% of the	100% of the
Dryer (purchase and		Qualified	Qualified
installation)		Project Cost	Project Cost
Electrical Service	\$4,000	50% of the	100% of the
Upgrade		Qualified	Qualified
		Project Cost	Project Cost
Electrical Wiring	\$2,500	50% of the	100% of the
Upgrade		Qualified	Qualified
		Project Cost	Project Cost
Maximum Total	\$7,340	50% of the	100% of the
Rebate Per Dwelling		Qualified	Qualified
Unit Under AUP		Project Cost	Project Cost

Participating Contractor Installation Incentives:

Measure Type (Qualifying Activity)	Participating Contractor Incentive Per Dwelling Unit
Installation located within a disadvantaged community	\$200
Installation of one electric heat pump clothes dryer	\$150
Installation of one or more electrical panel	\$150
Installation of electric wiring	\$150
Maximum Total Incentive Per Dwelling Unit Under HEAR	\$500

Appliance Upgrade Program Customer Application Process

- 1. Create a profile on the <u>MyEnergy Portal</u> and complete an Appliance Upgrade Program application
- 2. Receive an email from <u>AUP@nyserda.ny.gov</u> with two coupon codes:
 - A coupon for a qualified appliance to be used at the selected Participating Retailer
 - A coupon for electrical panel and wiring upgrades, if needed, as well as appliance installations with a **Participating Contractor**
- 3. Browse the **ENERGY STAR® Qualified Products List** to select the desired heat pump clothes dryer model
- 4. Visit selected Participating Retailer (in-store or online) and present the **Appliance Coupon code** to receive rebates
- 5. If a contractor is needed, select a Participating Contractor and present the **Installation Coupon code**



Appliance Upgrade Program Project Process



Key:

- Participating Retailer (PR): Handles Appliance Coupons and Sales Documentation
- Participating Contractor (PC): Handles PC Installation Coupons (for measure installation(s)) and Quality Install Documentation
- Implementation Contractor (IC): Implements the Appliance Upgrade Program

Questions?

Email: IRAretail@nyserda.ny.gov

Webpage: https://www.nyserda.ny.gov/All-Programs/Appliance-Upgrade-Program





Instruction

- 2 minutes or less per person
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Zoom App/Online

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2-MINUTE TIMER





Panel 3: Point-of-Sale Programs

Amber Beck, CEC





Robert Curis

Sr. Manager, Government Affairs, Lowe's Home Improvement

SAMSUNG

Prerna Tomar Director, Public Policy, Samsung



Brian Gamberini

Sr. Manager, State and Local Government Relations, The Home Depot



Inflation Reduction Act: A Retailer's Perspective



About Lowe's

- Leading home improvement company serving approximately **16 million customer transactions a week**.
- Operating 1,700 home improvement stores and more than 130 supply chain facilities, employing approximately 300,000 associates around the country.
 - In California, Lowe's operates **112 store locations**, **16 other facilities**, and employs approximately **17,000 associates**.
- Facilitating utility rebate programs, like the IRA rebates, in 34 states including California.
- Only nationwide retailer operating IRA rebates in multiple states.
- #1 appliance retailer in the United States.



Advantages of Working with Lowe's

- Lowe's has a dedicated team collaborating with states, the Department of Energy (DOE), vendors, and other stakeholders to develop and implement Inflation Reduction Act (IRA) rebate programs, helping customers take advantage of them.
- First retailer in the country to offer IRA Home Energy Rebates at the retail point-of-sale.
- Positioned to support both homeowners and Pro customers in utilizing these programs.
- Lowe's associates are well positioned to educate customers about available rebates and the benefits of energy-efficient products.
- Lowe's serves a network of service providers, installers, and the professional contractor community.



Homeowner

Single family homeowner or condominium owner

DIY — homeowner-led projects for replacement products
 Purchasing and fulfillment sources:

- Lowe's stores and online at Lowes.com
- Nationwide delivery network



PROfessional

Property management - residential and commercial

Multifamily rental and housing authorities
 Trades - electricians, plumbers and more

Construction

Repair, remodel and restoration
 Builders and construction
 State-approved contractors



Purchasing and fulfillment sources Convenient locations of 1,700 stores

- Direct-to-customer delivery options, as soon as same-day, inclusive of rural communities
- $\ensuremath{\boxdot}$ Lowe's stores nationwide and online at Lowes.com
- Lowe's Pro Supply with 29 branches in major markets and online at LowesProSupply.com*



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In-Store and Online Experience



In-Store Signage

Signage is displayed in stores guiding customers to the relevant website to apply for their state's rebate program where they can begin the application process.



Coupons

Once verified, customers can receive a Lowe's coupon that can be used at checkout in stores and online.



Pro Desk

Lowe's Pro Desks can share with Pro customers how Lowe's can provide them with eligible products and share educational materials from states, like how to join their approved contractor network.



Homeowner

Single family homeowner or condominium owner

☑ DIY — homeowner-led projects for replacement products
 ☑ Purchasing and fulfillment sources:

- Lowe's stores and online at Lowes.com
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Supporting PROs

- Lowe's commitment to supporting IRA implementation extends to professional customers across various segments, including:
 - Government entities
 - Community organizations
 - Residential property management professionals
 - Professional trades
 - Construction
 - Renovation markets
- Bulk purchasing and volume savings through Lowe's Pro Supply.
- General contracting support for product-only sales, as well as product and installation through Lowe's PRO Renovations.
- Fast delivery options are available to **both rural** and urban communities.



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Single family homeowner or condominium owner

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 ☑ Purchasing and fulfillment sources:

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SAMSUNG

Prerna Tomar, Director, Public Policy Samsung Office of U.S. Public Affairs

Samsung: An ENERGY STAR Award Leader

IRA Home Energy Rebates: Benefiting the Consumer and U.S. Policy Goals via Energy Efficient Products

Samsung: An ENERGY STAR Award Leader

Engaging federal and state government officials, retailers and non-profits

Worked with DOE to move from \$840 to \$1,680 in rebates for ENERGY STAR electric cooking products and heat pump dryers

DOE Retail Resource

DOE Press Release: "Providing rebates via retail can raise awareness of the HEAR program and efficient electric appliances"

"States that are prioritizing consumer awareness in their program design may benefit from a retail rebate delivery approach to drive widespread familiarity with efficient electric appliances." (p.2)

"A phased or partial roll-out of rebates based on product type may streamline aspects of program delivery and . . . build excitement for the launch of a state's broader HEAR program." (p.5)

Source: https://www.energy.gov/scep/articles/getting-started-launching-retail-focusedhome-electrification-and-appliance-rebates

Samsung: First Appliance Company to Launch IRA Home Energy Rebates Consumer Education Effort

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Inflation Reduction Act Appliance Rebates

What is the Inflation Reduction Act

n Act IRA Rebate-Qualifying Appliances

Energy-Efficient Appliances Find Out If You Qualify

Inflation Reduction Act home energy rebates are now available in New York

State residents can save up to \$840 on Bespoke Al Laundry Combo™ and select heat pump dryers.

1

Act fast, chat with an expert about \sim our Limited

Type your message here!



Sign >

SAMSUNG

Samsung: An ENERGY STAR Award Leader

Contact:

Prerna Tomar, Director, Public Policy Samsung Office of U.S. Public Affairs **Email:** p.tomar@samsung.com



Retail Point-of-Sale Programs

Brian Gamberini, The Home Depot Sr. Manager, State and Local Government Relations



The Home Depot in California

- Our Core Values guide everything we do.
- We build strong relationships within the community.
 - 246 Stores
 - 300+ locations including brick and mortar stores, warehouses and offices
- We foster shared success for both THD and our vendor partners.
 - 1,500+ local suppliers that include small and diverse businesses
- We give back to our communities and those that served our country through Team Depot.











The Home Depot's Role in HEEHRA's Success

- THD is prepared to play a role in the success of CA's POS rebate programs.
- THD supports a customer focused approach.
- THD recommends a seamless and scalable POS system for retailers and customers.
- THD welcomes partnering with CEC to promote rebate redemption.
 - Prepared to post signage in-store and partner on marketing of the program
- Currently running in-store POS insulation rebates in partnership with New Mexico (EMNRD)

Get up to \$1,600 off Qualifying Insulation Products.









How THD Plans To Increase Customer Engagement

- THD appointed role on the CA Heat Pump Partnership Advisory Committee
 - Goal of installing six million Heat Pumps by 2030
- PRO engagement for contractor facing programs
 - THD's extensive network of certified service providers and contractors
 - Communicate with PROs serving CA customers
 on program guidelines and training requirements
- Cross functional support across the business
- Investment in the future tradesmen and women of CA through Path To PRO











Final Public Comment





Instruction

- 2 minutes or less per person
- 1 representative per organization

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For Phone Participation: Dial (669) 219-2599 or (888) 475-4499 Enter Webinar ID: 846 9759 6010 and Passcode 105746

2-MINUTE TIMER



Submit Comments and Information

Written Comments:

Due January 10, 2025 (5:00 pm)

IRA Docket: 23-DECARB-01

https://efiling.energy.ca.gov/Lists/DocketLog. aspx?docketnumber=23-DECARB-01

Submit Comments

https://efiling.energy.ca.gov/Ecomment/Ecom ment.aspx?docketnumber=23-DECARB-01

Contact:

IRAresidentialenergyreabtes@energy.ca.gov

Information:

<u>CEC Inflation Reduction Act Programs</u> https://www.energy.ca.gov/programs-andtopics/programs/inflation-reduction-actresidential-energy-rebate-programs

IRA FAQ

https://www.energy.ca.gov/programs-andtopics/programs/inflation-reduction-actresidential-energy-rebate-programs/faq-ira

<u>Customer Support – HEEHRA TECH Clean</u> <u>California</u>: https://techcleanca.com/HEEHRA



Adjourn

