



## PROGRAM CHECKLIST & FREQUENTLY ASKED QUESTIONS

### Energize Liberty Utilities Homes

*A special program for Liberty Utilities customers in Missouri*

#### **Program Checklist**

Use the following checklist to assist you with the Energize Liberty Utilities Homes process. Forms referenced below are available from a qualified auditor.

**STEP 1** – Schedule a whole house energy assessment (or energy audit) using a qualified auditor. A list of qualified auditors is available at **Approved Auditor List** or contact EarthWays Center (EWC) at 877-474-6749.

**STEP 2**– Complete the **Audit Summary Form** and the **Rebate Assignment Form** (if desired), with input from the auditor/contractor, and submit to EWC with supporting documentation for project review and approval. All required files should be bundled and submitted at one time, either electronically or hard copies. These can be submitted by the homeowner or the auditor.

NOTE: Certain health and safety issues identified during the initial audit may result in your application being placed on-hold until a certified HVAC contractor or the auditor provides documentation indicating the problem(s) have been addressed. See program Terms and Conditions for additional explanation.

**STEP 3** – Upon satisfactory completion of the technical review, EWC will contact the homeowner via “Project Approval” letter. If data omissions or errors exist, EWC will contact the auditor to resolve the issues. The homeowner will be notified of any errors or omissions within the application forms. Once the project is approved, the homeowner can finalize the project scope and schedule contractors.

NOTE: If revisions to the project scope are required, it will be necessary to update and resubmit the all of the appropriate files (Go back to Step 2). EWC will place your application on-hold until any and all issues are addressed.

**STEP 4** – Complete the installation of approved energy efficiency measures.

**STEP 5** – After the energy efficiency work is complete, contact the auditor to schedule a “Post Test” inspection to verify that the improvements meet program requirements. Documentation from the “Post Test” inspection is necessary to process your rebate.

NOTE: Certain health and safety issues identified during the “Post Test” inspection may result in your application being placed on-hold until a certified HVAC contractor or the auditor provides documentation indicating the problem(s) have been addressed. See program Terms and Conditions for additional explanation.

**STEP 6** – Submit the **Rebate Request Form**, along with all required supporting documents, including receipts for the energy audit and energy efficiency upgrade(s) to EWC.

**STEP 7** – Allow approximately 4 weeks to receive your rebate check.

**STEP 8** – Enjoy the improved comfort of your home and energy savings!

If you have any questions about the program process, contact EWC at 877-474-6749.

## **Frequently Asked Questions**

### **What is the Energize Liberty Utilities Homes Program?**

Energize Liberty Utilities Homes Program is designed to encourage homeowners to complete home improvements that conserve energy, save money, and increase comfort. For approved projects, a portion of the cost is refunded in the form of a rebate that is assignable to another party, such as the contractor doing the work. This may help minimize out-of-pocket expenses.

### **Who is EarthWays Center?**

EarthWays Center (EWC), a non-profit organization located in St. Louis, MO, assists with program delivery for Liberty Gas Utilities in Missouri.

### **Who is eligible for this program?**

Eligible program participants are owner-occupants of single- or multi-family homes (applicant must own the entire building and occupy at least one dwelling unit in multi-family homes) must be occupied by the applicant and located in Missouri and the applicant must have an active Liberty Utilities account throughout the entire process. New construction, new additions to homes and major renovations of unconditioned spaces are not eligible expenses under the program.

### **How do I get started?**

Select an auditor from the qualified auditors list and schedule a whole-house energy audit. Contact EWC for additional assistance at 877-474-6749.

### **What improvements to my home can be included?**

In order to simplify our program we have determined that, in most cases, a 30% reduction in air leakage accompanied by improving attic insulation to R-49 will yield a 10% gas savings per Tier 1. After this is completed an upgrade in furnace efficiency from 80% or lower to 92% or greater will qualify for the Tier 2 level.

### **How much will my rebate be?**

Rebate amounts will vary depending on the level of energy efficiency achieved and on the eligible costs of the recommended upgrades you select. The table below identifies rebate levels:

<b>CATEGORY</b>	<b>PROGRAM REQUIREMENT</b>	<b>INCENTIVE</b>	<b>CAP</b>
Audit	Implement recommended upgrades to meet minimum Tier 1 requirements	100% of audit cost	\$500
Tier 1	Achieve 10% natural gas savings through recommended building shell measures only	35% of eligible project costs	\$2,000
Tier 2	Achieve 20% natural gas savings. Recommended building shell measures must be installed before equipment measures.	50% of eligible project costs	\$5,000

### **What are eligible project costs?**

Eligible project costs include the costs for equipment, materials, and labor directly related to the projects identified on the Audit Summary Form.

### **Can the Rebate be assigned to the contractor?**

Yes. See the 'Rebate Assignment Form that is attached to the Rebate Application

### **Are "Do It Yourself" projects eligible for rebate?**

Homeowners are allowed to install the prescribed energy efficiency upgrades, as listed in the Audit Summary Form, if they are trained and qualified to perform such tasks and the improvements are installed according to industry standards. Do-it-yourself labor is not eligible for rebate.

For guidance on industry standards for efficiency upgrades, please visit [www.energystar.gov](http://www.energystar.gov) Upgrades to mechanical systems should be performed only by trained HVAC and/or plumbing technicians. The auditor will review all improvements during the post-improvement inspection ("Post Test") to insure they have been completed in a satisfactory manner.

**What projects are not eligible for rebates?**

Projects for green houses, swimming pools, mobile homes, or any project that increases the energy load of a home or increases the conditioned space area will not be considered for rebate. Additionally, projects involving the installation of a renewable energy system or kitchen appliance upgrades/replacements will not be considered for rebate.

**Can I receive a rebate for a project that I have already started or installed?**

No. Projects at homes that have not received an energy audit by an approved auditor for this program or projects that are underway before receiving an audit are not eligible for rebate.

**Can rebates be combined?**

All homeowners who complete the initial audit are eligible to apply for either a Tier 1 or a Tier 2 rebate, but not both. Liberty Utilities Home Performance Program rebates cannot be combined with other Liberty Utilities rebate programs.

**What would disqualify my home from receiving a rebate?**

Certain conditions identified during the inspections that pose a significant risk to the occupant's health and safety might prevent a homeowner from moving forward with the energy efficiency improvements. Specifically, carbon monoxide levels over 99 ppm in the furnace or water heater flue system, insufficient draft pressure for the water heater and/or furnace, incorrect flue angle, and whole house ventilation 30% below the BPI building airflow standard. The auditor will determine if any of these potentially hazardous conditions exist in your home and will notify you. The homeowner must correct such conditions prior to completing energy efficiency projects and submitting documentation requesting a rebate.

**How much time is available to complete my energy efficiency project?**

Homeowners are allowed six months to complete their energy conservation projects AND submit a completed Rebate Request Form with supporting documents. Rebate Requests received beyond six months of the audit will not be eligible for a rebate.

**What happens if I complete an audit and decide not to complete energy efficiency upgrades?**

If the homeowner decides not to complete the upgrades after receiving the audit report, the homeowner will be responsible for the entire cost of the audit and will not be eligible to receive a rebate.

**What happens if I do not install all of the energy efficiency upgrades identified on the Audit Summary Form?**

If a homeowner finds that the upgrades identified on the Audit Summary Form cannot be completed as planned for any reason, the homeowner must contact EWC for approval of the project revisions. The homeowner and auditor will revise and resubmit the Audit Summary Form and all supporting documentation to EWC.

Furthermore, if a homeowner completes upgrades but does not achieve the minimum requirements for Tier 1, the homeowner will be responsible for the entire cost of the audit and the improvements and will not be eligible to receive a rebate for the project. It is important to complete every item listed on the Audit Summary Form submitted for project approval.

**If I close my Liberty Utilities account at any time prior to receiving the rebate, will I still get a rebate?**

No. You must maintain owner-occupation, and your Liberty Utilities account must remain active throughout the entire process. If the Liberty Utilities account is closed at any time up to disbursement, you will no longer be eligible for a rebate.

**How much time will it take to receive my rebate after submitting my Rebate Request Form?**

After submitting the Rebate Request Form along with all required documentation, please allow 4-6 weeks before receiving the rebate check.

**What is a W-9 form and why is it required?**

IRS form W-9, "Request for Taxpayer Identification". The IRS requires all payments over \$600 be reported as taxable income. Liberty Utilities Home Performance Program rebates over \$600 will be reported to the IRS as taxable income.

**How can I get more information?**

Visit <https://missouri.libertyutilities.com/jackson/residential/ways-to-save/natural-gas/energize-liberty-utilities-homes.html> or contact EWC at 877-464-6749 for more information.