

# Additional Program Requirements

## Sarnia Saves Residential IRP Pilot Program (the “Pilot”)



### 1. Sarnia Saves Residential Whole Home Direct Install and Sarnia Saves Residential Whole Home Rebate (“Assessment Stream”)

The Assessment Stream is delivered through two delivery models—the Direct Install path and the Rebate path, as further described below.

#### **Sarnia Saves Residential Whole Home Direct Install**

Under the Direct Install path, participants proceed with installing eligible measures using contractors from the Delivery Agent’s trade ally network as defined below. Under this delivery model, Rebates (as defined below) are paid by Enbridge Gas directly to the Delivery Agent, who in turn disburses the applicable payments directly to each contractor. The delivery model eliminates the need for participants to make any upfront investment. This streamlined approach is designed to maximize participation and ease of access for participants. Participants in this path must complete a pre- and post-installation assessment conducted via the Delivery Agent. Enbridge Gas will cover the combined cost of the pre- and post-assessments.

#### **Sarnia Saves Residential Whole Home Rebate**

Under the Rebate path, the participant will work with its own contractors outside the Delivery Agent’s trade ally network to implement eligible measures. Under this path, the participant is responsible for assessing the eligibility of the measures (insulation, water heater, etc.) installed and must notify the Delivery Agent once the eligible measures are installed. Following confirmation that the measures installed meet the eligibility criteria, the participant would subsequently receive a Rebate in accordance with the Pilot requirements, as further specified herein, as well as in the Program Application and corresponding Terms and Conditions attached thereto. Participants in this path must complete a pre- and post-installation assessment conducted via the Delivery Agent. Enbridge will cover the combined cost of the pre- and post-assessments.

### 1.1. Eligible measures

The eligible measures under the Assessment Stream are:

- i. Attic insulation
- ii. Exposed floor insulation
- iii. Exterior wall insulation
- iv. Basement insulation
- v. Crawl space insulation
- vi. Draft proofing
- vii. Window/door/skylight/sliding door
- viii. Water heaters

To participate in the Assessment Stream, each participant must install at least one of the qualified insulation measure listed in items (i) – (v) above, and as further detailed herein (each, an “Insulation Measure”). In addition, any Draft Proofing, Window/Door/Skylight/Sliding Doors, or Heat Pump Water Heaters measures (listed in items (vi) – (viii) above, respectively) must be done in conjunction with an Insulation Measure.

### 1.2. Minimum eligibility criteria

To participate in the Assessment Stream, each participant must:

- i. Have an active Enbridge Gas account in good standing;
- ii. Be an eligible customer type that primarily space-heats their dwelling type with natural gas at the time of the pre-assessment;
- iii. Complete a pre-assessment, install at least one Insulation measure and complete a post-assessment by December 31, 2026; and
- iv. Ensure that an NRCAN-registered Registered Energy Advisor (“REA”), who is an employee or subcontractor of an Enbridge Gas approved delivery agent (the “Delivery Agent”), conduct the pre- and post-assessments. The Delivery Agent will provide each eligible participant with an REA and schedule the assessments for a time that works for the participant.

Only the following residential dwelling types are eligible to participate in the Assessment Stream:

- v. Single detached and semi-detached homes;
- vi. Row housing;
- vii. Townhomes (excluding stacked townhomes);
- viii. Mobile homes on a permanent foundation; and
- ix. Microbusinesses (small businesses operating from former residential dwellings with residential-sized heating and cooling equipment).

For greater certainty, and without limiting the foregoing, the following residential dwelling types are not eligible under the Assessment Stream:

- x. Homes not space-heated by natural gas at the time of the pre-assessment;
- xi. Homes less than 6 months old;
- xii. Multi-unit residential buildings (MURBs) with more than 3 stories or a building area larger than 600 m<sup>2</sup>, including retirement homes;
- xiii. Low-rise MURBs (3 stories or less with a building area of 600 m<sup>2</sup> or less); and
- xiv. Stacked townhomes.

### 1.3. Incentive structure

Under the Assessment Stream, Enbridge Gas may provide eligible participants who implement an eligible measure listed in the table below with a financial incentive in the amount corresponding with such eligible measure in the table below (a “Rebate”). Measures for which a Rebate is being claimed must be separated and itemized on an invoice. The total Rebate cannot exceed the lesser of the project cost of the upgrade or \$15,000 per participant.

**Table 1: Assessment stream incentive structure by measure**

Item	Measure	Qualifiers	Maximum Incentive
Energy assessments	Pre-Audit and Post-Audit	Can only receive this once per premise	Up to full cost coverage
Exposed floor insulation	Exposed floor	Minimum R-20	Up to full cost coverage
Exterior wall insulation	Exterior wall	Minimum R-7.5	Up to full cost coverage
Attic insulation	Attic	Increase attic insulation to at least R-50	Up to full cost coverage
	Cathedral/flat Roof	Increase cathedral ceiling/flat roof insulation to at least R-20	Up to full cost coverage
Basement insulation	Basement wall	For adding insulation value greater than R-10	Up to full cost coverage
	Basement slab	Minimum R-3.5	Up to full cost coverage
	Foundation header	Minimum R-20	Up to full cost coverage
Exterior crawl space insulation	Exterior crawl space wall	Minimum R-10	Up to full cost coverage
	Crawl space ceiling	Minimum R-24	Up to full cost coverage
Draft proofing	Draft proofing	Achieve the target in the Participant Renovation Upgrade Report.	Up to full cost coverage
Windows, doors, skylights and sliding doors	Windows, doors, skylights and sliding doors	Each window, door, skylight or sliding door replaced with an ENERGY STAR® certified model.  (Minimum of 3 windows or 1 door or 1 skylight or 1 sliding door replaced with ENERGY STAR certified models required)	\$100 per rough opening (see section 1.4)
Water heating	Heat pump water heater	Replace Participant’s natural gas domestic water heater with an ENERGY STAR certified Domestic Heat Pump Water Heater <a href="#">ENERGY STAR technical specifications</a>	\$500

<sup>1</sup> An REA is a certified energy advisor who conducts EnerGuide Assessments to inform customers about energy efficiency opportunities in their homes. These assessments are also used to measure whole-home energy savings after a post-assessment is completed.

\*Insulation between two interior spaces, adjacent units Insulation between two interior spaces, including adjacent units and walls that do not face the exterior, is not eligible for an incentive and must be separated from eligible insulation on an invoice.

### 1.4. Additional measure criteria

Without limiting any requirement herein, the following additional requirements apply to all eligible measures under the Assessment Stream. Failure to comply with any such requirements will disqualify a participant from receiving an eligible measure or Rebate, as applicable, under the Assessment Stream.

#### Windows, doors, skylights and sliding doors:

- Eligible participants may receive a Rebate in the amount of \$100 per rough opening for each window, door, skylight or sliding door replaced with an ENERGY STAR certified model. A ‘rough opening’ is defined as a structurally stable opening in an outside wall. The opening may be surrounded by framing members (e.g., studs, lintels) or by solid material (e.g., concrete, solid wood logs). A rough opening serves the purpose of installing one or more windows or doors. The Rebate is offered per rough opening, as opposed to per number of windows or doors installed within the opening.
- At a minimum, three (3) window rough openings or one (1) door rough opening or one (1) skylight rough opening or one (1) sliding door rough opening are required to be upgraded to qualify for a Rebate.
- For further clarity, replacing only one (1) or two (2) windows in one (1) or two (2) rough openings with ENERGY STAR certified models will not qualify for a Rebate, whereas replacing three (3) windows in three (3) rough openings with ENERGY STAR certified models would qualify for a Rebate of \$300.
- To receive a Rebate under this category, eligible participants must replace non-ENERGY STAR certified models with ENERGY STAR certified models
- To receive a Rebate under this category, eligible participants must keep the ENERGY STAR labels on the new windows and doors until after the post-assessment.

- A complete new window or door and frame replacement can be inserted into the existing frame of an old window or door, but replacements of only the glass, sash or door without a frame are not eligible for a rebate.

**Table 2: Rough opening examples**

<b>Rough openings examples</b>	<b>Rebate</b>	<b>Rebate Grand Total</b>
Replace 3 windows in 3 rough openings with ENERGY STAR certified models	\$300	\$400
Replace 1 sliding door in 1 rough opening with ENERGY STAR certified model	\$100	
Replace 2 windows in 2 rough openings with ENERGY STAR certified models	\$0	\$0
Replace 1 windows in 1 rough opening with ENERGY STAR certified models	\$0	\$100
Replace 1 sliding door in 1 rough opening with ENERGY STAR certified model	\$100	
Replace 3 windows in 1 rough opening with ENERGY STAR certified models	\$0	\$200
Replace 1 door in 1 rough opening with ENERGY STAR certified model	\$100	
Replace 1 sliding door in 1 rough opening with ENERGY STAR certified model	\$100	

**Exposed floor**

- The exposed floor area may be composed of either one large, exposed floor area or multiple smaller areas.
- This can include overhangs and floors above unheated spaces such as an unheated garage.

**Attic insulation**

- A 'roof assembly' can be an attic, a cathedral ceiling, a flat roof, or a combination of any of these three.

**Basement insulation**

- 'Foundation header' can be a basement header, a crawl space header, or a combination of these two. Foundation headers are not eligible to count as a Qualified Measure in isolation but can qualify for a Rebate when done in combination with crawl space wall insulation or basement wall insulation. For clarity, if you insulate the foundation header without insulating the crawl space wall or basement wall, you will not be eligible to receive a Rebate for the foundation header area.

**Draft proofing**

- The Renovation Upgrade Report provided by the REA will provide a target to improve the airtightness of the home.
- In some instances, performing Draft Proofing may result in inadequate ventilation.

**Heat pump water heaters**

- Installation: heat pump water heaters must be installed by a licensed and trained professional.
- Eligible product list: to be eligible under the Assessment Stream, heat pump water heaters must be on NRCAN's list of eligible products.
- Performance criteria: natural gas heated homes: To be eligible under the Assessment Stream, a natural gas domestic water heater must be replaced with an ENERGY STAR certified domestic heat pump water heater.

**1.5. Delivery approach**

The Assessment Stream will be delivered by the Delivery Agent on behalf of Enbridge Gas. The Delivery Agent will manage relationships with local trade allies to deliver turnkey solutions customized for residential customers within the Pilot area. The Delivery Agent will recruit and onboard local trade allies, coordinate outreach efforts, identify opportunities, connect customers with these trade allies, and provide support throughout the process from engagement to equipment installation. This includes eligibility confirmation, managing and reviewing contractor costs, authorizing work, and reviewing/gathering submitted project documentation.

The Pilot offer will be delivered in both a Direct Install and a Post-Install Rebate path.

**Direct Install Path (primary delivery method)**

In the Direct Install path, participants proceed with installing eligible measures using contractors from the Delivery Agent's trade ally network. Under this delivery model, Rebates are paid by Enbridge Gas directly to the Delivery Agent, who in turn disburses the applicable payments directly to each contractor. The delivery model eliminates the need for participants to make any upfront investment. This streamlined approach is designed to maximize participation and ease of access for participants.

**Post-Install Rebate Path (alternative option)**

The participant may choose to work with their own contractors outside the Delivery Agent's trade ally network. In this case, the participant is responsible for assessing eligibility of the measures (insulation, water heater etc.) installed and must notify the Delivery Agent once the eligible measures are installed. Following confirmation that the measures installed meet the eligibility criteria, the participant would subsequently receive a Rebate in accordance with the Pilot requirements, as further specified herein, in the Program Application and corresponding Terms and Conditions attached thereto.

The following criteria and requirements apply to the Post-Install Rebate path:

- A pre-assessment must be completed through the Delivery Agent to identify potential eligible measures.
- A quote for the measures should be sent to the Delivery Agent prior to purchase and installation of any measures.
- The Participant must receive approval from the Delivery Agent for any invoice costs for which a Rebate is being claimed. Rebates will not be provided for any costs not pre-approved by the Delivery Agent.
- Once approved, the homeowner proceeds with the installation and notifies the Delivery Agent once the eligible measures are installed.

- The participant is responsible for confirming that the measures installed meet the measure and program eligibility criteria (as set out herein, in the Program Application and corresponding Terms and Conditions attached thereto).
- A post-assessment must be completed through the Delivery Agent following the installation of the eligible measures.
- Rebates will be issued only after the post assessment is complete, and all other Assessment Stream requirements are satisfied.

## 2. Sarnia Saves Residential Whole Home Direct Install and Sarnia Saves Residential Whole Home Rebate (“Assessment Stream”)

The RAI offer will be delivered by the Delivery Agent on behalf of Enbridge Gas, who will manage relationships with the contractors and customers within the Pilot area. The Delivery Agent will recruit local contractors, coordinate outreach efforts, connect customers with contractors, and provide support throughout the process from engagement to equipment installation. This includes eligibility confirmation, managing and reviewing contractor costs, authorizing work, and reviewing/gathering submitted project documentation.

The RAI Offer will be delivered only through a Direct Install path. Through this path, the participant must proceed with installing eligible measures using contractors provided via the Delivery Agent. Through this path, the contractor will apply the discount on the invoices covering the cost for the eligible measures, avoiding the requirement for participants to make an upfront investment. Pre- and post-assessments are not conducted for the RAI Offer.

<sup>2</sup> Contractors sell, source, and install energy efficiency measures.

### 2.1. Minimum eligibility criteria

To participate in the RAI Offer, each participant must:

- Have an active Enbridge Gas account in good standing;
- Be an eligible customer type that primarily space-heats their dwelling type with natural gas at the time of the insulation installation; and
- Complete the attic insulation upgrades with a Pilot-approved contractor.

Only the following residential dwelling types are eligible to participate in the RAI Offer:

- Single detached and semi-detached homes;
- Row housing;
- Townhomes (excluding stacked townhomes);
- Mobile homes on a permanent foundation; and
- Microbusinesses (small businesses operating from former residential dwellings with residential-sized heating and cooling equipment).

For greater certainty, and without limiting the foregoing, the following residential dwelling types are not eligible under the RAI Offer:

- Homes not space-heated by natural gas at the time of the pre-assessment;
- Homes less than 6 months old;
- Multi-unit residential buildings (MURBs) with more than 3 stories or a building area larger than 600 m<sup>2</sup>, including retirement homes;
- Low-rise MURBs (3 stories or less with a building area of 600 m<sup>2</sup> or less); and
- Stacked townhomes.

### 2.2. Incentive structure

Under the RAI Offer, Enbridge Gas offers an incentive for the eligible measure listed in the table below. Enbridge Gas must review and approve (in writing) each quote for eligible measures (presented as separate line items) prior to purchasing or implementing any measure. Insulation between two interior spaces, adjacent units etc. is not eligible for an incentive and must be separated on an invoice.

**Table 3: enhanced single measure incentive structure by measure**

Item	Measure	Qualifiers	SLH Pilot Maximum Incentive
Attic insulation	Attic	Insulate to a minimum r-50	Up to full cost coverage

## 3. Sarnia Saves Residential Limited Electrification Offer (“LE Offer”)

Under the LE Offer, eligible participants may receive an electric cold climate air source heat pump (“ccASHP”) or electric ground source heat pumps (“GSHP”). Participation in the LE Offer is limited to 20 participants in respect of ccASHP, and 10 participants in respect of GSHP, on a first-come-first-served basis (as determined by Enbridge Gas in its sole and absolute discretion). Participants in the LE Offer may be eligible to receive a maximum of one eligible measure installed per eligible home. Pre- and post-assessments are not conducted for the LE Offer.

### 3.1. Sarnia Saves Residential Limited Electrification Offer (“LE Offer”)

To participate in the LE Offer, the following minimum criteria must be met:

Participants must:

- Have an active Enbridge Gas account in good standing; and
- Fully switch from natural gas space heating to electric after measure installation without any back up natural gas space heating options. Participant does not need to disconnect their natural gas service.

Projects must:

- Be a first-time installation of an eligible electric heat pump system.
- Be located in one of the following eligible building types:
  - Single detached, semi-detached, row house, townhome, or mobile home on a permanent foundation
  - Microbusiness (small businesses operating from former residential dwellings with residential sized heating and cooling equipment).
  - Part 9 MURB (Multi-unit residential buildings).
- Meet measure-specific minimum eligibility requirements.

### 3.2. Incentive structure

Under the LE Offer, eligible participants may be eligible to receive a ccASHP or GSHP (but not both), subject to the cost limits specified in the table below. Receiving a measure under the LE Offer is conditional upon Enbridge Gas’ prior written approval of the applicable quote for the eligible electric ccASHP or electric GSHP measure presented as a separate line item. Centrally ducted, partially ducted, or ductless electric ccASHPs – such as mini-split and multi-split systems – and electric GSHPs are eligible under the LE Offer.

**Table 4: LE Offer Incentive Structure by Measure**

Electric Heat Pump Measure	SLH Pilot Maximum Incentive
Electric ccASHP Full Equipment	Up to the lesser of (A)100% of purchase and installation cost; and (B) \$15,000.
Electric GSHP Full System	Up to the lesser of (A)100% of purchase and installation cost; and (B) \$30,000.

### 3.3. Additional measure criteria:

To be eligible to receive an eligible measure or Rebate, the participant must install either a ccASHP or GSHP that meets the specific eligibility requirements specified below. The installed ccASHP or GSHP must meet the following requirements:

- a. The ccASHP or GSHP and any connected ductwork must:
  - i. be properly sized to ensure occupant comfort and satisfaction, and optimize system performance and energy savings; and
  - ii. comply with all applicable laws, building codes and guidelines, and any additional permitting requirements.
- b. The ccASHP or GSHP must be capable of distributing heat throughout the entire conditioned space in the house, including the basement (if applicable). The applicable contractor installing the ccASHP or GSHP (each, an “HVAC Contractor”) is responsible for specifying (including load calculations, sizing and selection) and installing the ccASHP or GSHP to meet this requirement.
- c. The installed ccASHP or GSHP must be capable of operating year-round (i.e., providing heating and cooling).
- d. The ccASHP or GSHP must include all components of a heat pump system, including indoor and outdoor units as well as the furnace and air handler, if applicable. All components must be compatible with one another.
- e. Existing or new backup gas heating sources cannot be used. Participants that keep an existing natural gas fireplace will remain eligible.
- f. The installation of the ccASHP or GSHP must be completed in accordance with all LE Offer requirements (as specified herein, in the applicable Program Application and the corresponding Terms and Conditions), by a licensed and trained HVAC Contractor who is selected by the Delivery Agent.

#### ccASHP Additional Eligibility

The installed ccASHP must be an active ccASHP model that is listed on [the NRCAN Eligible Product Lists for Air Source Heat Pumps and Cold Climate Heat Pumps \(published on the NRCAN website\)](#) and meets the ccASHP Efficiency Requirements specified below e). Any measure with a de-listed, inactive, or archived status on the NRCAN list does not qualify for a Rebate. The ccASHP must also meet the following requirements:

- a. For eligible Enbridge Gas customers, NRCAN sizing option 4D is eligible for a Rebate, as described in the [ASHP sizing and selection guide](#).
- b. The following ccASHP system types are eligible:
  - i. Centrally ducted ccASHP system (central system) meeting an approved NRCAN sizing option.
  - ii. Ductless or partially ducted mini-split ccASHP systems meeting an approved NRCAN sizing option. These include “single head” (one indoor air handler per outdoor compressor) and “multi-split” or “multi-head” (more than one indoor air handler per outdoor compressor) systems, provided the installed system meets the heat distribution requirements specified in Section 3.3.2.
- c. The ccASHP installation must include all components of the heat pump system. For mini or multi split systems, this means both the indoor and outdoor units. For central systems, this means the indoor and outdoor units, as well as the furnace or air handler as applicable.
- d. The ccASHP Efficiency Requirements under this Pilot Electrification Offer are in Table .

**Table 5: ccASHP efficiency requirements**

Criteria	Specification
Type	ccASHP
Min. HSPF2 region V	6.6
Min. SEER2	15.2
Min. System Heating Rated Capacity at 8.30C (470F) BTU/HR	12,000
Min. COP -150C (50F) at max capacity operation	1.8
Min. Capacity maintenance (max -150C (50F))/ Rated 8.30C (470F), %	70
Product status	Live/active
Variable capacity*	Yes
Sold in	CA

\*with three or more distinct operating speeds or continuously variable speed.

#### GSHP additional eligibility

The installed GSHP must be an active GSHP model that is listed on [the NRCAN Eligible Product Lists for Ground Source Heat Pumps \(published on the NRCAN website\)](#). Any unit with a de-listed, inactive, or archived status on the NRCAN list does not qualify for a Rebate. The GSHP must also meet the following eligibility requirements:

- It must be a full GSHP system installation (including both indoor and outdoor components) and meet [Canada's Energy Efficiency Regulations](#).
- Direct expansion (DX), water-to-water, and brine-to-water systems are not eligible for a Rebate.
- It is highly recommended that participants request that their HVAC Contractor sign an attestation form confirming that the installation has been completed according to the CSA standard – ANSI/CSA/IGSHPA C448 series “Design and installation of ground source heat pump systems for commercial and residential buildings”. The link to the standard can be found here [\(ANSI/CSA/IGSHPA C448 SERIES\)](#).

#### ccASHP and GSHP HVAC Contractor Eligibility

The participant must use an HVAC Contractor provided by the program Delivery Agent for the installation of the ccASHP or GSHP.

### 3.4. Delivery approach

The LE Offer will be delivered by the Delivery Agent, who will manage relationships with the HVAC Contractors (trade allies) and customers within the Pilot area. The Delivery Agent will recruit local trade allies, coordinate outreach efforts, identify opportunities, recommend appropriate equipment sizing, connect customers with trade allies, and provide support throughout the process from engagement to equipment installation. This includes eligibility confirmation, managing and reviewing contractor costs, authorizing work, and reviewing/gathering submitted project documentation.

The LE Offer will be delivered only through the Direct Install path. Through this path, the participant must proceed with installing eligible measures using an HVAC Contractor provided via the Delivery Agent. Through this path, the HVAC Contractor will apply the discount on the invoices covering the cost for the ccASHP or GSHP, avoiding the requirement for participants to make an upfront investment.

## 4. Past program participation

If a participant has previously received, or expects to receive, a rebate or other incentive through another Enbridge Gas program (“Legacy Program”) such participant may still be eligible to participate in the Pilot. However, any participant that has previously received an incentive under a Legacy Program will not be eligible to receive a measure, or Rebate for any measure, as applicable, under the Pilot, for which such participant previously received an incentive (financial or otherwise) under any Legacy Program.

Examples:

- If a participant received a rebate under the HER+ (Home Efficiency Rebate) program for installing replacement windows, they cannot receive another Rebate under the Pilot for those same windows. However, the participant may be eligible to receive a Rebate for different windows that were not the subject of any incentive under HER+ or any other Legacy Program.
- If a participant previously insulated 20% of their attic and now applies to insulate the remaining 80%, they may be eligible for a Rebate on the portion of the attic that was not previously incented.

**Note:** The Delivery Agent will determine and confirm eligibility for any measures during the application and assessment process.

## 5. Subsequent participation in the Pilot

Once a participant has received an eligible measure or Rebate through the Pilot, their file will be closed, and Enbridge Gas will have no further obligations to any participant under the Pilot.

Notwithstanding the foregoing, a participant may re-apply to the Pilot, provided that:

- The participant meets all then-current eligibility requirements as specified for each Pilot Offer.
- The participant will not receive any measure or Rebate in respect of any measure for which the participant previously received, or received a Rebate in respect of, under the Pilot.