

At-a-Glance Project Requirements Checklist for Contractors

GoGreen Home Energy Financing Program



gogreen
FINANCING™

BORROWER

- ☐ Owner, or tenant with written permission from owner

PROPERTY

- ☐ Receives either gas or electric service from an IOU (PG&E, SDG&E, SoCal Gas, or SoCal Edison)¹ or City of Palo Alto Utilities (CPAU)²
- ☐ Upgrade is for 1-4 units
- ☐ Single-family, townhome, condo/apt unit, or manufactured/mobile home with permanent foundation

ELIGIBLE ENERGY MEASURES (EEMs)

- ☐ Measures are on the EEMs list³ OR are eligible for an IOU/REN/CCA energy efficiency or demand response program
- ☐ Title 24/20 compliant (and ENERGY STAR, if applicable)
- ☐ Cool Roofs, EV Chargers, Solar PV and Battery Storage EEMs are eligible **only** for properties receiving electricity from PG&E, SDG&E or SoCal Edison³

¹ Customers served by both a non-IOU gas utility (Southwest Gas, Long Beach Utilities, the City of Vernon, or the City of Coalinga) and IOU electric utility are limited as to the amount of gas-only EEMs (like furnaces or gas clothes dryers) they can finance. For those customers, electric EEMs must comprise 70% of the loan value and gas EEMs are limited to 30%.

² EEMs List: [GoGreenFinancing.com/ResidentialMeasures](https://www.gogreenfinancing.com/ResidentialMeasures)

³ If financing the Battery Storage EEM (CE-BATT), property must already have an existing Solar PV system

PROJECT

- ☐ Maximum loan amount: \$75,000 per unit for projects that include the bundled Solar PV + Battery Storage EEM; \$50,000 for all other projects
- ☐ 70% or more of loan amount funds EEMs and other legally & practically necessary alterations (e.g. permits, safety testing, patching and paint)²
- ☐ 30% of the loan amount may be used for additional related home improvements (e.g. new cabinets)
 - Inefficient versions of EEMs (e.g. non-ENERGY STAR refrigerator) are not eligible

ADDITIONAL REQUIREMENTS

- ☐ Borrower must be provided with a [Bill Impact Estimate](#)
- ☐ Contractor must be enrolled in the GoGreen Home Program at time of project approval
- ☐ Combustion appliance safety testing must be conducted, [if required](#)
- ☐ All legally required permits must be obtained
- ☐ For Solar PV/Battery Storage projects: Contractors must submit copy of IOU Interconnection Application(s) and closed permits to Lender

Note: Projects with multiple contractors may result in a funding delay until the entire project is complete. Talk with the lender about options in this situation.