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Section 1

Introduction

1.1 Program Overview

Santee Cooper is pleased to offer its 2024 Smart Energy New Homes (SENH) Program (**Rebate Program or Program**). The Program promotes the implementation of high-energy efficiency measures in homes that are new construction or total gut-rehab. Rebates promoted through this Program aim to increase the construction of energy efficient new homes in Santee Cooper's service territory by encouraging builder's participation. The Program offers a performance pathway for builders to participate. The following is a list of measures included in this Rebate Program:

Performance Pathway

- Tiered rebate offer based on HERS Score for Single Family Homes
- Tiered rebate offer based on HERS Score for Multi-family Homes
- ENERGY STAR® Certification Bonus

In addition to these rebates, the program offers bonus incentives for builders building ENERGY STAR® certified homes.

This manual outlines the requirements of the 2024 Rebate Program. This Rebate Program is available from December 1, 2023, to November 30, 2024.

1.2 Program Administration

Santee Cooper or its designee, if applicable may conduct the following activities including, but not limited to the following: facilitate project information requests from Builders; educate Builders on new Program offers and industry best-practices; conduct Program training for Builders and HERS raters; perform inspections; and perform measurement and verification activities.

1.3 Program Contact Information

Questions and additional information about the Program can be directed to Santee Cooper via:

- Web:** www.empowerSChome.com
Email: residential.energy@santeecooper.com
Phone: (843) 347-3399 ext. 3910 (Horry and Georgetown Counties)
and (843)761-8000 ext. 3910 (Berkeley County)

Submittals:

Builders can send their completed applications and the required documentation to:

- Email to:** residential.energy@santeecooper.com
Mail to: Santee Cooper Energy Support Services
305-A Gardner Lacy Road
Myrtle Beach, SC 29579

Section 2 Eligibility Requirements and Rebate Information

2.1 Participant Eligibility

The Smart Energy New Homes Program is available to builders that build new homes or perform gut-rehab on existing homes in Santee Cooper’s service territory. Homes must meet the following requirements to be eligible for rebates as part of Santee Cooper’s Smart Energy New Homes Program:

- The home must be new construction¹ or a total gut rehab².
- The home must be separately metered and receive electrical service from Santee Cooper.
- The home must be a single-family construction or a unit in a multi-family building that has its own heating, cooling, and hot water systems, separate from other units.
 - Definition of Single-Family vs Multi-Family:
 - Single Family – non-stacked residences with their own HVAC and water heating systems (*i.e., Detached Homes, Duplexes, and Townhomes*)
 - Multi-Family – any stacked residences with their own HVAC and water heating systems (*i.e., Apartments and Condominiums*)
- ENERGY STAR® bonuses for Multi-Family units may be given for residential and mixed-use (residential and commercial) construction as long as it falls within ENERGY STAR®’s policy (See ENERGY STAR® Multifamily New Construction Requirements, Version 1).
- The home must be all electric, excluding hybrid heat pumps, gas water heater, gas cooktops and gas fireplaces.
- All construction on the home must be completed and a permanent meter set prior to November 30, 2024.

2.2 Program Measures

A home may qualify for Program measures under the Performance Pathway. In addition, Builders participating through the Performance Pathway may be eligible for Bonus rebates. The energy-efficiency measures available through the Program are provided in Table 2-1 below. Additional information about measure eligibility and rebate amounts can be found in Section 4 *Measure Catalogs*.

Table 2-1 Program Measure Summary

Performance Pathway
<ul style="list-style-type: none"> • Tiered rebate offer based on HERS Score for Single Family Homes

¹ A “new construction” home is a home built of entirely new structures that has not been previously occupied.

² A “total gut rehab” is a complete restoration of a building or house wherein everything inclusive, i.e., the thermal envelope, electrical wiring, Heat Pump equipment, plumbing, windows, doors, etc., are updated to current code compliance except for the actual framed structure itself.

Performance Pathway

- Tiered rebate offer based on HERS Score for Multi-family Homes
- ENERGY STAR® Certification Bonus

The energy performance of the home must be verified by a certified HERS Rater using [RESNET](#) accredited home modeling software.

Bonus measures are available to Builders participating under the Performance Pathway.

Definition of Single Family vs Multi-Family:

- Single Family – non-stacked residences with their own HVAC and water heating systems (*i.e., Detached Homes, Duplexes, and Townhomes*)
- Multi-Family – any stacked residences with their own HVAC and water heating systems (*i.e., Apartments and Condominiums*)

Multi-family ENERGY STAR® Bonus rebate levels shall apply to all attached homes that fall within ENERGY STAR®'s policy on qualifying units in multi-family buildings (See ENERGY STAR® Multifamily New Construction Requirements Version 1).

Detailed information on specific eligibility for qualifying energy-efficiency measures and equipment is included in the Section 4.

2.3 Program Funding

Program funds are limited, and rebates are subject to funding availability. Santee Cooper will accept Project Completion Forms on a first-come, first-served basis until the conclusion of the Program term, or until Program funds are no longer available, whichever occurs first. Builders requesting rebates after all available Program funding for the Program year is committed will be offered the option to be placed on a waiting list in the order that the applications are received by Santee Cooper for consideration in the subsequent Program year.

2.4 Rebate Payments

Rebates will be in the form of a check and made out to the Builder and will be mailed within 2-3 weeks after the final approval of the Project Completion Form. Final rebate payments are subject to Builder meeting all eligibility and Program requirements and Santee Cooper's review of all required documentation and approval of the completed project. Builders are responsible for paying all fees and costs associated with the HERS Rater and the Program measures implemented. Rebate payments are directly tied to a home's actual energy performance and any changes to the design or specifications of the home(s) that reduce a home's performance may result in a reduction or loss of rebate(s).

Section 3

Participation Process

There is one general participation pathway for the Rebate Program – Performance Pathway. Detailed information about the participation process is provided below. Additional information about the pathway, measure eligibility, rebate amounts and Program documentation requirements can be found in Section 4 *Measure Catalogs*.

3.1 Performance Pathway

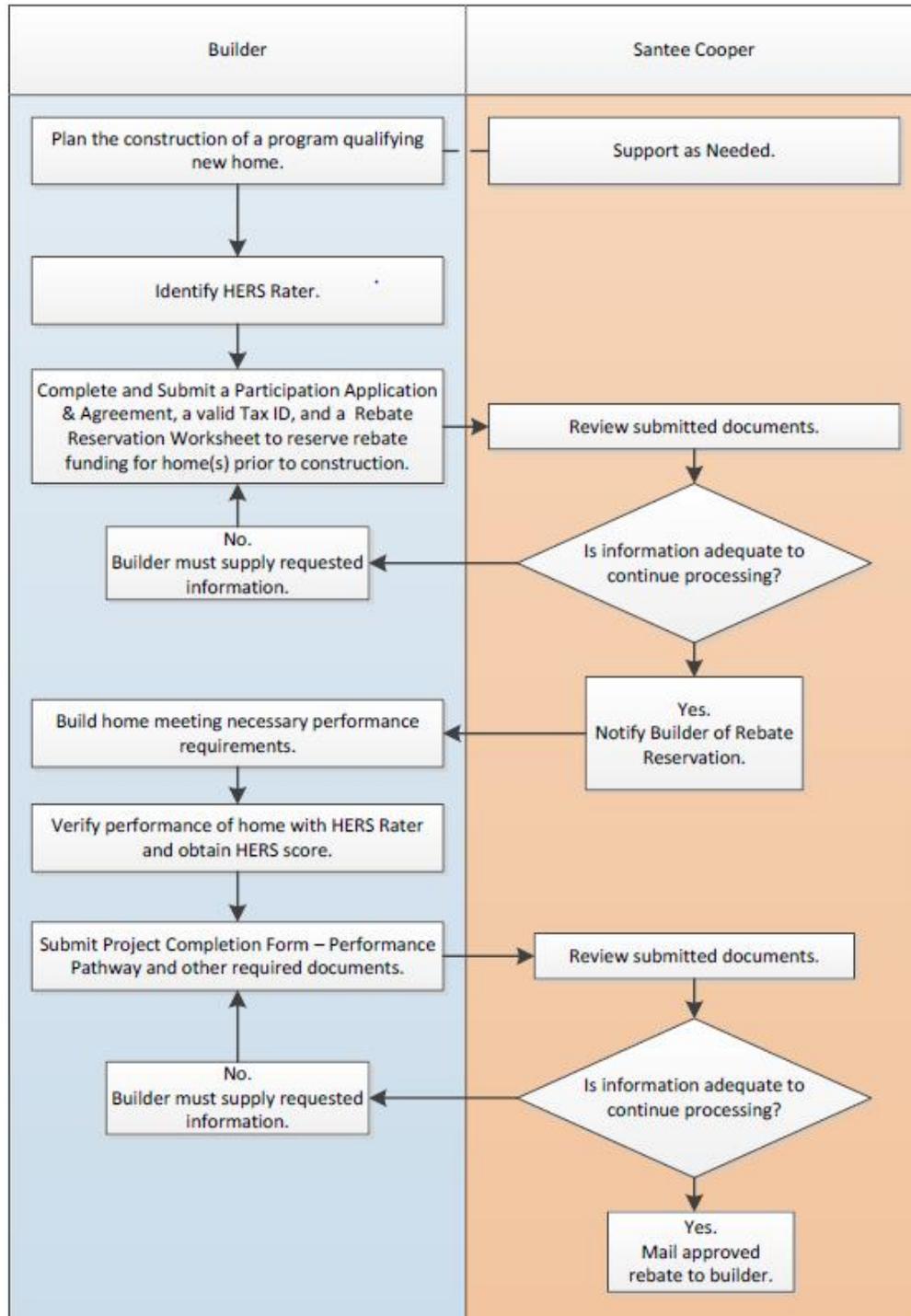
Builders may participate in the program through the Performance Pathway by following the steps below:

- Step 1:** Confirm eligibility
- Step 2:** Select a Certified Home Energy Rating System (HERS) Company
- Step 3:** Submit a Rebate Reservation Worksheet to reserve rebate funding for home(s) prior to home completion
- Step 4:** Complete and submit a Participation Application & Agreement and Form W-9 (a Form W-9 is only required once per Program term)
- Step 5:** Receive written notification of rebate reservation
- Step 6:** Build home to achieve a qualifying performance rating
- Step 7:** Verify the home's energy performance with the HERS rater and obtain a HERS Certificate showing a Program qualifying HERS score
- Step 8:** Submit a Project Completion Form –and other required documents by November 30, 2024
- Step 9:** Receive rebate payment

Note: HERS raters are required to comply with current South Carolina energy codes and industry standard testing methodologies such as Duct Envelope Testing (DET).

Figure 3-1 below shows a graphical representation of the participation process.

Figure 3-1 Participation Process for Performance Measures



3.2 Rebate Reservation Requests

Builders must submit a SENH Rebate Reservation Worksheet to reserve rebates for the home(s). Rebates will be reserved on a first come, first served basis. The Rebate Reservation Worksheet should be submitted as soon as the Builder plans a home or sub-division and is required to be submitted prior to completion of the home(s). It may be submitted with the Participation Application and Agreement. The worksheet must be completed for each home or multi-family unit, but a builder may include multiple homes planned as part of a sub-division in one Rebate Reservation Worksheet.

Additional Rebate Reservation Worksheets can be submitted throughout the year for other eligible projects and should be submitted as soon as qualifying projects are identified by the Builder. Rebate shall be reserved on a first come, first served basis. Builder information on the Rebate Reservation Worksheet must be the same as provided in the Participation Application and Agreement.

Upon receipt of the Rebate Reservation Worksheet, Santee Cooper will send Builder a notification (email is sufficient) regarding the status of the reservation request. No rebates will be paid for any homes completed prior to receipt of the notification of rebate reservation with confirming enrollment in the Program.

3.3 Participation Application and Agreement

Builders are required to submit a fully completed Smart Energy New Homes Program Participation Application and Agreement (“Rebate Application”) along with a Form W-9 prior to completion of the home(s). A Form W-9 is only required once per Program term. Submission of an application, even if correct and complete, does not guarantee payment of rebates.

3.4 Project Completion

Construction for all homes must be completed and a permanent meter set prior to November 30, 2024. Upon project completion, Builders are required to submit a Project Completion Form and all required documentation as specified in Section 4, *Measure Catalogs*. All Project Completion Forms must be submitted before November 30, 2024.

3.5 Inspections

Santee Cooper or its designee, at its sole discretion, may inspect the associated residence prior to (i.e., during the test-in and test-out), or up to two (2) years after approving the Project Completion Form. The inspection may include a phone survey and/or site visit. Such visits may also include the installation of temporary monitoring equipment. Discrepancies identified during an inspection from information listed on the Builder’s Project Completion Form or incorrect installation of systems may delay or void rebate payment. Builders will be notified upon completion of the inspection if any discrepancies were identified, and specific action items will be required to complete the rebate fulfillment process. If Santee Cooper requests a site inspection or survey to be completed, the Builder must complete the inspection or survey within 30 calendar days of such request. Builder understands that the inspections conducted by a HERS rating company or Santee Cooper Energy Advisor are solely for the purpose of determining if the home(s) meet the performance requirements of Smart Energy New Home and are not safety or building code inspections.

Section 4

Measure Catalogs

Detailed information on measure eligibility, rebate amounts and participation information are provided in the following Measure Catalogs:

Performance Pathway

HERS Score-Based Tiered Rebate for Single Family Homes

HERS Score-Based Tiered Rebate for Multi-family Homes

Bonuses⁵

ENERGY STAR[®] Bonus

⁵Multi-family ENERGY STAR[®] Bonuses must meet the qualifications listed in the ENERGY STAR[®] Multifamily New Construction Requirements Version 1

4.1 Performance Pathway Catalog

4.1.1 Performance Pathway Measures

This Performance Pathway Catalog describes the eligibility requirements and rebate amounts for homes participating through the Performance Pathway under Santee Cooper's Smart Energy New Homes Rebate Program (Rebate Program). Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

To be eligible for rebates through this Rebate Program, Builders must meet the following requirements:

- Qualifying equipment and materials must be new
- The home must be new construction or total gut rehab as defined in Section 2
- The home must be separately metered and receive electrical service from Santee Cooper
- The home must be a single-family construction or a unit in a multi-family building that has its own heating, cooling, and hot water systems, separate from other units.
 - Definition of Single-Family vs Multi-Family:
 - Single Family – non-stacked residences with their own HVAC and water heating systems (*i.e., Detached Homes, Duplexes, and Townhomes*)
 - Multi-Family – any stacked residences with their own HVAC and water heating systems (*i.e., Apartments and Condominiums*)
- The home must be all electric, excluding hybrid heat pumps, gas water heater, gas cooktops and gas fireplaces
- Qualifying measures must be completed in a manner that meets or exceeds all applicable code and regulatory requirements
- Construction must be completed and a permanent meter set prior to November 30, 2024
- Rebates for Bonus Measures are only available to Builders applying under the Performance Pathway

4.1.2 Tiered Rebate Offer Based on HERS Score for Single Family Homes

Measure Description: Single family homes that achieve a Home Energy Rating System (HERS) score of 85 or below

Applicability: New construction or total gut rehab single family residential homes

Performance Eligibility: To be eligible to receive rebates, a qualifying home must achieve a HERS Rating of 85 or lower as verified by an independent HERS rater. The home must meet 2009 IECC requirements.

Rebates: See Table 4-1

Table 4-1 Eligibility Requirements and Rebate Amount for Single Family HERS

Tier	Requirements	Rebate Per Unit	
		All Electric	Gas Water Heating
Tier 1	Achieve a HERS Index of 65 or below	\$3,000	\$1,800
Tier 2	Achieve a HERS Index of 75 or below	\$1,600	\$500
Tier 3	Achieve a HERS Index of 85 or below	\$800	\$0

Documentation Requirements: The following items must be submitted to be eligible for a Program rebate:

- 1) A Rebate Reservation Worksheet
- 2) A Smart Energy New Homes Program Participation Application and Agreement and a Form W-9 (a Form W-9 is only required once in a Program Year)
- 3) Project Completion Form - (to be submitted by Rater or Builder upon completion of the home by November 30, 2024)
- 4) Heat Pump AHRI Certificate(s)
- 5) Domestic Hot Water Heater AHRI Certificate or specification sheet containing energy factor and rated storage volume (if electric water heating)
- 6) For homes modeled in REM/Rate
 - a. Fuel Summary Report (with reference home)
 - b. Home Energy Rating Certificate showing the HERS score of 85 or less
- 7) For homes modeled in Energy Gauge:
 - a. Savings Summary
 - b. Home Energy Rating Certificate showing the HERS score of 85 or less
- 8) For homes modeled in Ekotrope:
 - a. Fuel Summary Comparison
 - b. Home Energy Rating Certificate

4.1.3 Tiered Rebate Offer Based on HERS Score for Multi-Family Homes

Measure Description: Multi-family units that achieve a Home Energy Rating System (HERS) score of 75 or below

Applicability: New construction and total gut rehab residential and mixed-use (residential and commercial) multi-family units.

Performance Eligibility: To be eligible to receive rebates, a qualifying multi-family unit must achieve a HERS Rating of 75 or lower as verified by an independent HERS rater. The building must meet 2009 IECC requirements.

Rebates: See Table 4-2

Table 4-2 Eligibility Requirements and Rebate Amount for Multi-Family HERS

Tier	Requirements	Rebate Per Unit
Tier 1	Achieve a HERS Index of 65 or below	\$1,400
Tier 2	Achieve a HERS Index of 75 or below	\$400

Documentation Requirements: The following items must be submitted to be eligible for a Program rebate:

- 1) Rebate Reservation Worksheet
- 2) A Smart Energy New Homes Program Participation Application and Agreement and a Form W-9 (a Form W-9 is only required once in a Program year)
- 3) Project Completion Form- (to be submitted by Rater or Builder upon completion of the home by November 30, 2024)
- 4) Heat Pump AHRI Certificate(s)
- 5) Domestic Hot Water Heater AHRI Certificate
- 6) Home Energy Rating Certificate showing the HERS score
- 7) Fuel Summary
- 8) REM/Rate file (if requested)

4.2 Bonuses Catalog

The Smart Energy New Homes Program offers bonuses for the construction of ENERGY STAR® certified homes. The following sections describe the requirements to be eligible for the bonuses in further detail. Bonus measures are available to Builders applying to the Program through the Performance Pathway.

4.2.1 ENERGY STAR® Certification Bonus

Measure Description: ENERGY STAR® homes are homes that meet the national program requirements for ENERGY STAR® Qualified Homes National Program Requirements Version 3.1 for single family homes, and Multifamily New Construction Program Requirements Version 1 for multi-family homes.

Applicability: New construction and total gut rehab residential single-family homes and new construction and total gut rehab residential and mixed-use (residential and commercial) multi-family units that fall within ENERGY STAR®'s policy on qualifying units in multi-family homes.

Rebates: See Table 4-3

Table 4-3 Eligibility Requirements and Rebate Amount for ENERGY STAR® Bonus

Building Type	Requirements	Rebate Per Unit
Single Family	Meet ENERGY STAR® Version 3.1 Requirements	\$100
Multi-Family	Meet ENERGY STAR® Multifamily New Construction Version 1 Requirements	\$100

Documentation Requirements: The following items must be submitted to be eligible for a Program rebate for the ENERGY STAR® Bonus:

- 1) ENERGY STAR® Certification in addition to all other Performance Pathway documentation requirements.
 - a. ENERGY STAR® Checklists for Single Family Homes:
 - i. National Rater Design Review Checklist
 - ii. National Rater Field Checklist
 - iii. National HVAC Commissioning Checklist (If Applicable)
 - b. ENERGY STAR® Checklists for Multi-Family Homes:
 - i. MFNC Rater Design Review Checklist
 - ii. MFNC Rater Field Checklist
 - iii. MFNC HVAC Functional Testing Checklist (If Applicable)

Appendix A

Glossary

ACCA: Air Conditioning Contractors of America

AHRI: Air-Conditioning, Heating and Refrigeration Institute

ANSI: American National Standards Institute

ARI: Air-Conditioning and Refrigeration Institute, which has become AHRI. ARI standards have been renamed as AHRI standards and compliance with AHRI standards is inclusive of ARI standards¹

ASHRAE: American Society of Heating, Refrigerating and Air-Conditioning Engineers

Btu/h (British thermal units per hour): energy that is produced or rejected from a system

CEE: Consortium for Energy Efficiency

CFM (cubic feet per minute): measurement of airflow

EER (energy-efficiency ratio): the ratio of net cooling capacity in Btu/hour to total rate of electric input in watts

HSPF (heating seasonal performance factor): a single number figure of merit expressing the seasonal heating efficiency of heat pumps, in Btu/watt-hour. The term is applied to heat pump systems less than 65,000 Btu/hour

HVAC: heating, ventilation, and air-conditioning

IECC: International Energy Conservation Code

lbs: pounds

R-value: a measure of thermal resistance used in the building and construction industry

SEER (seasonal energy-efficiency ratio): the total cooling output of an air conditioner or heat pump during its normal annual usage period for cooling, in Btu, divided by the total electric energy input during the same period, in watt hours

SF or sq-ft: square foot

¹ See <http://www.ahrinet.org/Pages/ShowMeMore.aspx?src=single&lpk=908> and <http://www.ashrae.org/publications/detail/16574> for press releases.

Appendix B

Energy Code Heat Pump Minimum Efficiencies

The energy code used in South Carolina, effective January 1, 2014, is the International Energy Conservation Code (IECC) 2009. Heat Pump standards for IECC 2009 are based on ASHRAE Standard 90.1-2007.



General Program Information:

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