



TMLP Saves™ Program Terms and Conditions for Residential Customers

The Taunton Municipal Lighting Plant (“TMLP”) offers eligible residential customers participating in the TMLP Saves™ Program financial incentives for weatherization, air sealing, barrier mitigation, and installation of Cold Climate Air Source heat pumps. TMLP offers rebates in the form of direct payments to the customer and the prepayment of interest on loans obtained from participating lenders to finance the costs of Cold Climate, Air Sourced Heat Pumps. The amount of the financial incentive varies depending on the customer’s income level, the scope of the work (whole home or partial home), type of work needed, and cost. See rebate information and Program requirements below.

Rebate and Zero-Interest Loan Incentives	
0% Interest Loan – Heat Pump Costs	Pre-payment of interest on out-of-pocket heat pump costs to participating lenders on loans up to \$25,000 with terms up to 7 years.
Rebates – Residential Customers	
Weatherization and Air Sealing (if needed)	75% of weatherization + 100% of air sealing, up to \$10,000 total
Barrier Mitigation (if needed)	50% of the cost of barrier mitigation, up to \$7,000
<i>Cold Climate, Air Source Heat Pump:</i>	
Whole Home and Partial Home Rebate	\$1,250/ton, up to \$10,000 total
Low- and Moderate-Income Customers*	
Weatherization and Air Sealing (if needed)	100% of weatherization + 100% of air sealing, up to \$10,000 total
Barrier Mitigation (if needed)	100% of the cost, up to \$7,000
<i>Cold Climate, Air Source Heat Pump:</i>	
Partial Home	\$2,250/ton up to \$15,000 total

*LMI customers must provide proof of income using the IRS tool (<https://www.irs.gov/individuals/get-transcript>) to qualify. You must submit a copy of the transcript of your most recent tax return, but no older than one year from the time of application. TMLP will use the Commonwealth of Massachusetts’s Low and Moderate Income Qualification Chart to determine LMI qualifications. In TMLP’s discretion, TMLP may accept proof of fuel assistance eligibility to qualify LMI customers.

1. **Eligibility.** You must be an existing residential electric customer of TMLP and the customer-of-record on the account for at least six months. Your account must be in good standing. You must own and reside at the property (*e.g.*, single family home, condominium unit, mobile home) at the service location. For two- or three-family homes and multi-unit apartment buildings, the owner must be a customer-of-record for at least one electric account and reside in at least one of the units. Customers must not be eligible to receive the same or similar incentives through another utility or low-income assistance incentive program. Gas customers should apply for rebates and zero-interest loan incentives through Mass Save. LMI customers may apply for incentives through LIHEAP and other low-income assistance programs, Landlords without an active account should contact TMLP to determine how they potentially may qualify for incentives under the TMLP Saves™ Program or other programs. Rebates and zero-interest loan incentives are limited to one per customer, even if the customer owns/is the customer-of-record for multiple properties. Eligibility requirements are subject to change.

2. **Obtain an Energy Efficiency Audit.** You must have obtained an energy efficiency audit through TMLP within the past three (3) years of application. Contact **Energy New England (ENE) at (508) 698-1200** to schedule an energy efficiency audit. ENE will send a copy of the audit report to you and TMLP. TMLP will review the audit report to determine Program eligibility. The energy audit must recommend the energy efficiency improvements to be eligible for the rebates and incentives under the TMLP Saves™ Program.

3. **Additional Requirements for Heat Pump Incentives (Heat Pump Rebate and Zero-Interest Financing).** In addition to the eligibility criteria:
 - **Heat pumps must be new and appropriately sized.** Heat pumps shall be sized to meet 90-120% of the total heating load at the outdoor design temperature, per ACCA Manual J Design Conditions, throughout 100% of the conditioned space. Licensed, Heat Pump Administrator (HPA) Third Party Vendor approved contractors must install heat pump equipment. You may not apply for incentives for heat pump systems previously rebated by TMLP.
 - **For whole-home projects, TMLP may require that the pre-existing heating system be removed or disconnected.** If TMLP permits the pre-existing heating system to remain in place, TMLP may require that the pre-existing system only may be operated

in an emergency (either heat pump maintenance down-time or if heat pump is not able to heat the home during an extreme weather event).

- **The home must be sufficiently weatherized to be eligible for heat pump financial incentives.** If the energy efficiency audit recommends weatherization/air sealing, you must perform the weatherization/air sealing work in accordance with the recommendations to be eligible for the heat pump rebate and payment of interest on your approved loan. If you fail to complete required weatherization/air sealing work, you may be required to repay any financial incentives paid in connection with the heat pump installation. TMLP may place a lien on your property to secure payment. Typically, weatherization will not be required if: (A) home/building was built during or after 2000, (B) the Home Energy Assessment/Audit report does not recommend weatherization or recommends only minimal weatherization – amounting to less than \$1,000 in weatherization costs, or (C) the customer can demonstrate that weatherization has been completed following a Home Energy Assessment/Audit within the past three years. Supporting documentation may be required upon request. Note that if the energy efficiency audit recommends both weatherization and heat pump installation, you may choose only to perform weatherization, but not vice versa.
 - **The home must be occupied full time during the winter heating season.**
4. **Barrier Mitigation.** If during the weatherization/air sealing work, your contractor determines that barrier mitigation is required, you may apply for a rebate for the barrier mitigation work following the same process. You must submit the Barrier Mitigation form signed by your and the contractor.
 5. **Contact TMLP** to review Program qualifications and requirements. TMLP may utilize the services of administrators to review and process applications and inspect projects. You may be required to work with multiple TMLP administrators depending on the type of the work.
 6. **Choose an Approved Contractor(s) and Request a Quote for the Proposed Work.** You are responsible for contracting with an approved contractor(s) to install the energy efficiency improvements. TMLP is not responsible for the sizing/design of the heat pump or the project or the contractor's work. TMLP does not guarantee energy or financial savings. TMLP approved-contractor lists are provided as a convenience to facilitate Program participation and provide uniform pricing for rebate eligibility purposes. TMLP shall not be liable for the suitability, sufficiency, quality, or safety of the contractor's work.
 7. **Submit a TMLP Saves™ Program Application and Required Rebate Documentation.** You must submit to TMLP or its designated administrator a TMLP Saves™ Program Residential Application along with a copy of the contractor agreement applicable to the type of work for each rebate sought. All contractor documents must be uploaded using the applicable administrator's tool. TMLP may request quotations and other information to determine rebate eligibility. If you are seeking to qualify as an LMI customer, you must submit verification of income with your rebate application. If you reside in a mobile home park or condominium development, you must include an authorization letter from the park owner/operator or home owners' association authorizing the installation, as applicable. TMLP may approve your rebate application, in whole or in part, request additional information, condition approval on additional terms and conditions, or deny your application for failure to meet Program requirements. If your application for a rebate is approved, TMLP will issue an approval letter, but your entitlement to the rebate is conditioned upon successful completion of the work. Approvals may be granted for up to three (3) direct rebates: (A) Weatherization/Air Sealing, (B) Barrier Mitigation, and (C) Heat Pump Installation. The approval letter will identify the type of rebate amount and the total rebate for the work. Rebates will be paid in the form of a check to the customer upon completion. Note: You may wish to condition your agreement(s) with the contractor on the receipt of rebate approvals and include provisions to ensure timely and successful completion of the work.
 8. **The work must be completed within one year of the date of your application.** TMLP may require the work to be performed in a specific sequence or schedule, as determined by TMLP on a case-by-case basis. The approval letter will identify any additional sequencing or scheduling requirements. Upon request and in its discretion, TMLP may extend the time for completion of the work for good cause only. Extensions must be in writing and signed by a duly authorized representative of TMLP to be binding.
 9. **0% Interest Loan.** If you are interested in financing out-of-pocket qualifying heat pump costs, TMLP will pre-pay the interest on all eligible and approved loans from participating lenders. You may apply for the interest incentive on your rebate application. If you are approved for TMLP's payment of interest on your loan, TMLP will issue a Zero-Interest Loan Authorization. **The Authorization is valid for a period of 90 days.** You must obtain a new Authorization Form if you apply for the loan after the Authorization expires. TMLP will pay interest payments only on the amount specified on the Loan Authorization. The amount authorized will be based on the cost of installation and equipment costs, less the amount of any applicable rebates.
 10. **Apply for a Loan from a Participating Lending Institution.** You must apply for the loan with a participating lending institution. When applying for the loan, you must submit a valid Loan Authorization Form issued by TMLP. Participating lending institutions include the Bristol County Savings Bank and the Taunton Federal Credit Union. TMLP reserves the right to revise the list of participating lending institutions. The bank will review your loan application and financials and either approve or reject or loan application. The determination of whether to

approve the loan is solely within lender's discretion. The lender will disburse the proceeds of the loan directly to you and TMLP will pre-pay the interest directly to the participating lender. The loan proceeds only may be used for approved heat pump costs. You will be required to repay the interest to TMLP if you do not install the heat pump, complete required weatherization, or otherwise comply with the terms and conditions. The amount of the interest paid by TMLP may become a lien on your property until you satisfy the Program requirements or repay the amount in full.

11. **Set up an Inspection/Quality Assurance (QA) Verification with the applicable TMLP Administrator** to ensure the preapproved work has been completed and installed in accordance with Program requirements. You or your contractor must contact the administrator upon completion of the work for an inspection/verification of completion certification for each project. For heat pump installations, you also must receive and provide the Heat Pump Administrator (HPA) an AHRI Certificate. Rebates will not be issued unless the work is successfully completed. You will not be entitled to the applicable rebate if you do not receive approval of the work within one year of submitting the application. You also may be required to repay any financial incentives pre-paid by TMLP. You are still responsible for the repayment of your loan to the lending institution in accordance with the terms of the loan. **TMLP processes and issues final rebate checks to the customer.** You are responsible for paying the contractor. Please note that rebate processing may take 6-8 weeks or longer.
12. **Additional Terms and Conditions May Apply.** TMLP or its administrators may impose project-specific requirements and energy efficiency standards, and TMLP may include additional terms and conditions in your approval letter. TMLP typically requires that projects meet state energy codes, as applicable, in order to qualify for financial incentives. You are responsible for contacting TMLP and/or the administrator applicable to the work to determine if additional or revised terms and conditions and requirements apply. For up-to-date information, please visit <https://www.tmlp.com/go-green/>.
13. **THE PROGRAM IS CONDITIONED UPON THE AVAILABILITY OF FUNDS. TMLP RESERVES THE RIGHT TO REVISE, SUSPEND OR DISCONTINUE THE PROGRAM, CHANGE ELIGIBILITY REQUIREMENTS, OR OTHER TERMS AND CONDITIONS WITHOUT PRIOR NOTICE AT ANY TIME. TMLP also may offer the Program on a trial basis and does not guarantee that your application will be processed or approved even if eligibility requirements are satisfied. If TMLP approves your application, you may rely on the authorized financial incentive(s) provided you fulfill all Program requirements.**
14. **Environmental Attributes.** By accepting the financial incentive(s) or services, TMLP shall be entitled to the ownership of, and title to, the renewable energy, clean energy, or other environmental attributes, if any, including renewable or clean energy certificates, associated with the equipment installation or any electricity produced by the facility. The customer shall take all required actions to transfer any such attributes to TMLP.
15. **Disclaimers/Limitation of Liability. TMLP DOES NOT WARRANT THE SERVICES OR THE WORK OF CONTRACTORS, EVEN IF PRE-APPROVED BY TMLP OR ON A PRE-APPROVED CONTRACTOR LIST. THE CUSTOMER IS RESPONSIBLE FOR OBTAINING AND CHECKING REFERENCES, SCREENING CONTRACTORS, AND SUPERVISING THE WORK. WHETHER BY INSPECTION, NON-REJECTION, OR OTHERWISE, TMLP DOES NOT WARRANT THAT THE WORK WILL RESULT IN ENERGY OR FINANCIAL SAVINGS OR THAT THE WORK WILL BE PERFORMED IN A SAFE AND COMPETENT MANNER AND IN ACCORDANCE WITH APPLICABLE LAWS AND CODES. ANY INSPECTIONS PERFORMED BY OR ON BEHALF OF TMLP SOLELY ARE FOR TMLP PURPOSES TO DETERMINE ELIGIBILITY FOR FINANCIAL INCENTIVES. ANY RECOURSE THAT YOU MAY HAVE WITH RESPECT TO THE QUALITY, SAFETY, SUITABILITY, OR SUFFICIENCY OF THE WORK SHALL BE BETWEEN YOU AND YOUR SELECTED CONTRACTOR. YOU ARE RESPONSIBLE FOR OBTAINING ANY REQUIRED PERMITS AND INSPECTIONS FROM CITY OFFICIALS. NO REPRESENTATIONS OR WARRANTIES MADE BY ANY TMLP STAFF MEMBER, ADMINISTRATOR, OR CONTRACTOR SHALL BE BINDING ON TMLP.**

Note: All payment arrangements for the work and financing, including payment of any required deposits and payment schedules, are solely between you and your contractor or lender. You are responsible for complying with the terms of your contractor agreements and loan.

Effective: February 20, 2024 _____