

**TVA IN-HOME EVALUATION PLAN**  
**Retrofit Incentive Schedule**  
**January 2009**

**Purpose**

To assist Participants in identifying energy efficiency opportunities and provide incentives for Participants to make recommended energy-related home improvements.

**Terms of Participation**

Participants must have an in-home evaluation completed by a TVA certified evaluator. The home must have had permanent electric service from Distributor for a minimum of one year. Participants may be charged a fee for the audit at the discretion of the Distributor.

**Evaluation Incentive**

- TVA will reimburse the Distributor \$150 for each In-Home Evaluation where the participant spends \$150 or more to implement recommended actions within 90 days of the recommendation. If an initial fee was charged, the distributor must reimburse the Participant the amount of the initial fee up to \$150.

**Participant Incentive Options**

- Either the Retrofit Incentive OR
- TVA Financing (Regions Bank or Energy Finance Solutions (EFS)) *Note: \*If a distributor provides its own financing, a Participant may receive the Retrofit Incentive and financing.*

**Retrofit Incentive**

- TVA will reimburse Distributor (who must reimburse the Participant) up to 50% of Participant cost or a maximum of \$500 for implementation of approved recommended actions.

**TVA Financing (subject to credit approval)**

- Regions Bank: 6%, up to 10 years, secured only if mechanical equipment included, serviced by Distributor (on-bill)
- EFS: 10-15%, up to 10 years, unsecured, serviced by EFS (not on-bill)

**Inspection**

- TVA requires inspection for 100% of the participants who request an incentive, either TVA Financing or the Retrofit Incentive.
- If the Distributor elects to perform the inspection, the inspection must follow the TVA guidelines.
- All inspections performed by a Distributor are subject to a Quality Assurance review.
- TVA will reimburse Distributor \$175 for each inspection performed by Distributor unless TVA determines from the Quality Assurance review or otherwise that the inspection was inadequate..

**Timing**

- Participants must submit receipts for Retrofit Incentive or TVA Financing within 90 days of the evaluation in order to be eligible for the Incentive.
- Participants who receive an Incentive, either TVA Financing or Retrofit Incentive, may not participate in the *energy right* Heat Pump program within 6 months from the date of the evaluation.
- Participants who receive an Incentive, either TVA Financing or Retrofit Incentive, will not be eligible to receive a subsequent Retrofit Incentive for the same address. However, the Participant may be eligible for financing (HVAC or weatherization) after one-year from the date of the evaluation.

**The following recommendations are not eligible for financing or Retrofit Incentive:**

- |                                      |  |
|--------------------------------------|--|
| • Water heaters (including tankless) | • Storm doors                              |
| • Clothes washers                    | • Window film/solar screens                |
| • Clothes dryers                     | • Radiant barriers                         |
| • Dishwashers                        | • Room air conditioners                    |
| • Refrigerators                      | • Programmable thermostats (existing HVAC) |
| • Insulated garage doors             |  |

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Retrofit Incentive: The Participant is eligible for a TVA reimbursement of 50% of the installation cost of measures recommended in the evaluation.

<b>Recommendation</b>	<b>Limit</b>	<b>Requirement</b>	<b>Included in Financing?</b>
Replace windows	\$500	Must meet Energy Star <sup>®</sup> requirements	No
Storm windows	\$500	Must meet <i>energy right</i> <sup>®</sup> requirements	Yes
Duct repair/replacement & sealing	\$500	<ul style="list-style-type: none"> <li>• Existing HVAC only</li> <li>• Air distribution only</li> </ul>	Yes
Rehabilitation work	\$250	<ul style="list-style-type: none"> <li>• Minor repair work such as broken glass, glazing or prime door replacement,</li> <li>• Removal of attic fan, resulting repair</li> <li>• Reinstallation of knee wall or floor insulation</li> <li>• AND Distributor pre-approval</li> </ul>	Yes
Replace HVAC <ul style="list-style-type: none"> <li>• All heat pumps included</li> <li>• Dual fuel heat pumps if pre-approved by Distributor</li> <li>• Air conditioning (with gas pack or gas split)</li> </ul>	\$250	<ul style="list-style-type: none"> <li>• Must meet Energy Star<sup>®</sup> requirements</li> <li>• Must be installed by a QCN contractor</li> <li>• Distributor pre-approval for dual-fuel or air conditioning</li> <li>• Split system must be replaced as single unit.</li> <li>• Must meet <i>energy right</i><sup>®</sup> requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Heat pumps</li> <li>• Dual-fuel heat pumps</li> <li>• Heat Pump Plan financing limits apply to equipment</li> </ul>
Attic insulation/ventilation (must be static)	\$500	<ul style="list-style-type: none"> <li>• Must meet <i>energy right</i><sup>®</sup> requirements (Weatherization)</li> </ul>	Yes
Floor or perimeter insulation, and ground cover	\$500	<ul style="list-style-type: none"> <li>• Must meet <i>energy right</i><sup>®</sup> requirements (Weatherization)</li> <li>• Where allowed by Codes</li> </ul>	Yes
Exterior wall insulation	\$500	<ul style="list-style-type: none"> <li>• Knee walls only (conditioned space)</li> <li>• R13 or greater with foam board</li> </ul>	Yes
Water heater insulation & pipe insulation	\$50	<ul style="list-style-type: none"> <li>• Electric only</li> </ul>	Yes
Air sealing (including weatherstrip and caulk)	\$500	<ul style="list-style-type: none"> <li>• Must meet <i>energy right</i><sup>®</sup> requirements (Weatherization)</li> <li>• Must be performed by QCN contractor (or self-installed as noted below)</li> </ul>	Yes
<u>Self installed</u> insulation, caulk, weatherstrip, rehabilitation (as defined above)	\$250	<ul style="list-style-type: none"> <li>• Only the cost of materials may be claimed</li> <li>• Distributor pre-approval</li> </ul>	No
HVAC tune-up	\$150	<ul style="list-style-type: none"> <li>• Must be performed by QCN contractor.</li> <li>• Clean or replace air filters</li> <li>• Clean &amp; inspect condenser coils</li> <li>• Clean &amp; inspect condensate drain</li> <li>• Check thermostat operation</li> <li>• Inspect clean &amp; straighten any bent fins</li> <li>• Inspect for proper fuse size &amp; type</li> <li>• Check input voltage and current</li> <li>• Clean, inspect &amp; lubricate condenser coil fan motor</li> <li>• Clean, inspect and lubricate evaporator coil blower motor</li> <li>• Clean &amp; inspect evaporator coil (if accessible)</li> <li>• Inspect electrical wiring</li> <li>• Inspect refrigerant piping for damage or leaks</li> <li>• Check sequence of operations in cooling mode</li> </ul>	Yes

