



**THE SUSTAINABILITY INSTITUTE'S
ENERGY ASSISTANCE PROGRAM FOR SANTEE COOPER RATE PAYERS
HOMEOWNER APPLICATION**

RETURN APPLICATION TO:

The Sustainability Institute
3973 Rivers Ave. Suite 101
North Charleston, SC 29405

Email:
info@sustainabilityinstitutesc.org

Last Name: _____ First Name: _____ MI: _____

DOB: _____ Age _____

Property Address: _____ City: _____ Zip Code: _____

Telephone Number: _____ Alternative Number: _____

Santee Cooper Account Number: _____

Community/ Neighborhood Affiliation (if applicable): _____

Provide the following documentation of relations to the physical property address:

- Proof of Ownership (Property Tax Receipt)
- Proof of Occupancy (Gas, Electric, or Water Bill)

If this is a heir's property please provide the following documentation to show ownership:

- Heir's birth and death dates
- County of death
- Proof of whether they died with a will
- Any current contact information for living heirs

Briefly describe reasons for applying to the Energy Assistance Program:

Are there any critical repairs needed to be made to the home? Briefly describe here:

Describe any home comfort issues or safety issues:

HOMEOWNER RELEASE AND WAIVER OF LIABILITY

- I am the legal occupant of the property on which the weatherization upgrades and/or home repairs are to be performed by The Sustainability Institute and/ or affiliated parties and have full authority to enter into this agreement.
- I agree to participate in the program and understand the work will be performed at no charge to me by The Sustainability Institute.
- I understand the work entails risks as outlined in the Application Package. I accept the conditions under which each weatherization and repair activity is conducted, and I accept and assume all risks inherent in each of these activities, including property loss/damage, personal injury (fatal or otherwise), and including those risks I may not foresee or anticipate.
- I understand that unforeseen conditions in my home concerning the health, safety or structural integrity of the home may require the program to halt provision of any energy audit, inspection, weatherization upgrade work or repair work, and that this will be at the sole discretion Sustainability Institute staff, program administrators, or program representatives. Program administrators reserve the right to:

- 1.) For any reason, change the program or modify scope of work for weatherization upgrades or repairs as needed without notice;
- 2.) Stop work on a home due to unforeseen conditions;
- 3.) Suspend or terminate projects at the discretion of program administrators.
- 4.) Photograph and take video of program participants and their properties for documentation/publicity purposes;

- I understand that The Sustainability Institute provides no guarantee or warranty to the performance of its weatherization upgrades or repairs and will not be held responsible for the failure of any measure implemented or equipment installed.
- I hereby agree to release, hold harmless and indemnify The Sustainability Institute and any person or organization that participates in any way in planning and/or executing this program, including its advisors, sponsors and volunteers, as well as any affiliated parties, from any and all liability, costs, claims, losses, or damages arising from, or in any way related to, my participation in this project.
- I have read this entire Release and Waiver of liability. I fully understand it and agree to be legally bound by it.

Name of participant (Print) _____

Signature of participant _____

Date: _____

HOME ENERGY AUDIT AGREEMENT

The Sustainability Institute
3973 Rivers Ave. Suite 101
North Charleston, SC 29405
director@sustainabilityinstitutesc.org
mitch@sustainabilityinstitutesc.org

Date _____

Client Name _____

Property Address _____

This Home Energy Audit Agreement has clearly defined limitations, terms and conditions that must be read and acknowledged by the Client. By signing this Agreement below, Client warrants they will read the entire Audit report produced subsequent to the inspection and shall promptly call The Sustainability Institute with any questions or concerns Client may have regarding the Audit or Audit report. This Audit is being performed for the exclusive use and benefit of the Client, and the Audit, including the Audit report, is not to be transferred to, utilized or relied upon by any other person or entity without prior written permission of The Sustainability Institute.

A. Scope of Energy Audit Assessment:

The Sustainability Institute will carry out an energy Audit and study of Client’s Residential Property at the above address in order to assess energy consumption and operational characteristics of the Residential Property for the purpose of recommending energy conservation measures, improved operating procedures, alternative energy systems, and/or other energy related services in order to reduce the Client’s energy consumption, expense, and overall environmental impact. The Audit inspection shall be limited to those systems and components expressly described in the Audit checklist and only as they pertain to energy consumption performance, as they exist at the time of Audit.

B. Limits of Energy Audit Assessment:

This Energy Audit Assessment is limited to those systems and components expressly and specifically identified in the Audit report, and only as they relate to energy consumption.

This is not a specialized inspection, such as that conducted by geologists, engineers, environmental specialists, and termite inspectors, who evaluate soil conditions, determine differential settling or structural movement, test the quality of air and water, or detect the presence of pests, rodents or harmful contaminates, such as radon, urea, PCB’s and other toxins, toxic or flammable chemicals, methane, asbestos, lead, formaldehyde, electro-magnetic radiation, molds, mildew, fungi, termites, and other wood-destroying organisms. It is the

responsibility of the Client to conduct further inspection by qualified consultants to disclose the presence of these contaminants and the means of remediation.

This Energy Audit Assessment is not a code-compliance inspection and does not include any research, such as that necessary to establish boundaries, easements, and the issuance of permits or certificates of occupancy. Nor is this Energy Audit Assessment and Audit report meant, in any way, to discover or report construction product defects in the Residential Property.

C. Limitation of Liability and Disclaimer of Warranty:

This Energy Audit Assessment and Audit report are not a guarantee or warranty that the items inspected are defect-free or that concealed defects do not or will not exist. Problems may exist even though signs of such may not be present during the assessment, or are hidden from the general visual assessment.

It is understood and agreed that The Sustainability Institute is not an insurer and that the assessment and Audit report are not to be intended or construed as a guarantee or warranty, express or implied, of the adequacy, performance or condition of any structure, item or system at the Residential Property.

D. Acknowledgment:

I, the undersigned, have carefully read the preceding Home Energy Audit Agreement and fully understand and agree with the limitations, exclusions and terms described. I also agree to pay any and all fees described below.

Participant Signature _____

Date: _____

APPLICANT QUESTIONNAIRE

Background Information

Q1- How would you best describe yourself?

- American Indian/Alaska Native
- Black/African American
- Hispanic/Latin/Spanish
- Native Hawaiian/Pacific Islander
- White
- Other: _____

Q2- What is your home ownership status?

- Owner-occupied with clean title to the property
- Own in common other family members (Heirs Property) or Renter

Q3- What is the homeowner's year of birth?

Q4- How many people live in the household?

- 1 person
- 2-3 persons
- 4- 5 persons
- 6+ persons

Q5- Ages of the oldest and youngest person in the household?

- Oldest _____
- Youngest _____

Q6- Do you have any of the following electronic devices? (Select all that apply)

- Cell Phone - Android
- Cell Phone - IOS
- Laptop
- Tablet - iPad
- Tablet - Other
- Other _____

Q7- Do you have reliable WiFi (internet connection) within the home?

Yes

No

Q8- What is the average annual income of your household?

\$0 - \$30,000

\$31,000 - \$60,000

\$61,000 - \$90,000

\$91,000 - \$150,000

\$151,000 or more

Q9- Does anyone in the household have limited mobility?

No-everyone is fully mobile- can maneuver around the full home

Yes- at least one person is partially mobile- can maneuver around part of the home

Yes- at least one person is not mobile- cannot easily maneuver around

Q10- What is the accessibility of the areas below?

	Very Accessible	Somewhat Accessible	Not Accessible At All
Basement or Crawlspace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bedroom(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kitchen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bathroom(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foyer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Property Information

Q11- Type of Property:

- Apartment
- Single-Family Detached
- Mobile
- Rowhome/Townhome
- Multifamily-Other

Q12- Year Property Was Built:

- Before 1950
- 1950-1969
- 1970-1999
- After 1999

Q13- What year did you move into the house?

Q14- How many floors are in the home?

- 1
- 2
- 3
- 4

Q15- How Many floors are used?

- 1
- 2
- 3
- 4

Q16- Square Footage of Dwelling (estimate)

- Less than 800 square ft
- 800-1000 square ft
- 1001-1200 square ft
- More than 1201 square ft

Q17- Do you have an exhaust fan in your bathroom(s)?

- Yes- in all bathrooms
- Yes- in some bathrooms
- No- none of the bathrooms

Q18- How often do you use the bath exhaust fan?

- Always
- Sometimes
- Never

Q19- Is the bath exhaust fan(s) vented to the outside?

- Yes
- Unsure
- No

Q20- Do you have an exhaust fan (range hood) in the kitchen?

- Yes
- No

Q21- Do you use the kitchen exhaust fan regularly?

- Always
- Sometimes
- Never

Q22- Is the kitchen exhaust fan vented to the outside?

- Yes
- Unsure
- No

Q23- Is your stove:

- Gas
- Electric

Q24- How old is the stove?

- Less than a year
- More than a year but less than five years
- Five years or greater

Q25- What is the condition of your stove?

- Good
- Fair
- Poor

Q26- What kind of water heater do you have?

- Gas
- Electric
- Oil

Q27- How do you heat your home? Select all that apply:

- Central Heating System with ductwork
- Gas Space Heater
- Electric space heater
- Other _____

Q28- How do you cool your home? Select all that apply:

- Central air conditioning system with ductwork
- Mini Split System (wall mounted unit inside and unit outside)
- AC Window Unit
- Electric Space Cooling Unit (portable unit)

Q29- If you have gas appliances, do you smell gas when you get close to any of them?

- Yes
- No

Q30- Are the heating and cooling systems running properly?

- Working Well
- Working Poorly
- Not working at all

Q31- How old are the heating and cooling units?

- Less than a year
- More than a year but less than five years
- Five years or greater

Q32- When were the heating and cooling units last serviced?

- Within the past year
- Within the past 2-3 years
- Within the past 4-5 years
- More than six years since the last service
- Never serviced

Q33- How many smoke detectors are installed and working in the home?

- 1-2
- 3-4
- 5 or more
- None

Q34- How many carbon monoxide detectors are installed and working the home?

- 1-2
- 3-4
- 5 or more
- None

Q35- Has there been a fire in the home?

- No
- Yes

Q36- If yes was selected, what was the severity of the fire?

- Major
- Moderate
- Minor

Q37- How Many pets do you have?

- 1-2
- 3-4
- 5 or more
- None

Q38- Do they have access to the whole house?

- Whole House
- Restricted to certain rooms
- Not in the house

Q39- Does anyone in your family smoke inside your home?

- No
- Yes

Q40- Does your home have a sump pump?

- Yes
- No

Q41- If you do have a sump pump, Is it working correctly?

- It works well
- It works sometimes
- Not working at all
- Unsure

Q42- Are you experiencing any Plumbing issues?

- No-Not experiencing any plumbing issues
- Yes- Plumbing issues with the sinks
- Yes- Plumbing Issues with the toilets
- Yes- Plumbing issues with the bathtub

Weatherization and Energy Use

Q43- How damaged has your home been from major floods, storms or hurricanes?

- Major
- Moderate
- Minor
- No Damage

Q44- Were you able to repair the damage?

- No- None of the damage was fixed
- Yes- Some of the damage was fixed
- Yes- All of the damage was fixed

Q45- What areas of the house are still damaged from flooding or storms? If none, leave blank.

	Major (3)	Moderate (2)	Minor (1)
Basement or Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bedroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kitchen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bathroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foyer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exterior	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q46- Has any work been completed in your home in the last year (could be as simple as painting)?

- Yes
- No

Q47- Have you ever applied for assistance to improve or fix damage to your home? (FEMA, Co-Op programs, Utility programs, Community Action Agencies, Nonprofit Organizations)

Yes

No

Q48- If you were approved, has any assistance or work been provided? (If yes, provide detail)

Not Approved

Yes- What Organization provided you with assistance and what did they do?

Q49- How frequently do they have trouble paying your energy bills?

Never

Sometimes

Frequently

Q50- Over the past two years how many disconnections have you had?

None

A few

Many

Q51- What is the condition of your windows?

Good

Fair

Poor

Broken Panes

Q52- What condition would you consider your drywall to be in?

- Good
- Fair
- Poor

Q53- Do you have any signs of water stains, high humidity, high moisture, or signs of mold?

- Significant
- Some
- Little
- None

Q54- If so, how long has this been an issue?

- Less than a year
- More than a year but less than five
- More than six years
- Not an issue

Q55- Have you noticed any chipping, flaking, peeling paint?

- Significant
- Some
- None

Q56- Have you ever had your tested for lead?

- Yes- It was found
- Yes- Not found
- No

Q57- How old is your roof?

- Less than a year
- More than a year but more than five
- More than six years

Q58- What is the condition of your roof?

- Good
- Fair
- Poor
- Not Sure/ Don't Know

Q59- Has there been any leaks in the roof?

- Major
- Moderate
- Minor
- None

Q60- Have those roof leaks been fully or partially repaired?

- Fully
- Partially
- Didn't get repaired

Q61- Do you have any issues with pests such as:

- Rodents
- Insects
- Termites
- Other Animals _____
- No Issues with pests

Q62- Are you aware of any Asbestos in your home?

- No
- Yes

Q63- Are you experiencing any electrical issues?

- No
- Yes-minor issues
- Yes- Major Issues

Q64- What condition is your foundation (slab, crawlspace, basement) in?

- Poor
- Fair
- Good
- Unsure

Q65- What condition are your floor and flooring supports in?

- Poor
- Fair
- Good
- Unsure

Q66- Does your home have any structural hazards such as uneven or sagging floors, damaged walls, or shifted foundational piers?

- No
- Yes



THE SUSTAINABILITY INSTITUTE
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Homeowner Consent Form for Level 1

Weatherization Services

Applicant Name: _____

Service Address: _____

The Sustainability Institute is offering weatherization services and energy efficiency upgrades to help reduce household energy consumption. These weatherization services will include an energy audit report and a scope of work, as well as impactful upgrades which will be installed at the time of the energy audit appointment.

These upgrades are defined as, but not limited to:

- Lighting upgrades
- Water Heater Insulation
- Weather Stripping and Door Sweeps
- Carbon Monoxide Alarms and Smoke Detectors
- Air Sealant Products

I hereby acknowledge the services offered and grant access to The Sustainability Institute to complete an energy audit and to install the defined upgrades at the time of a scheduled appointment. I understand that the estimated energy use and savings contained in the report does not guarantee or warranty of actual energy cost or usage reductions.

Printed Name: _____

Homeowner Signature: _____ Date: _____



THE SUSTAINABILITY INSTITUTE
3973 Rivers Ave Suite 101
North Charleston, SC 29405

Santee Cooper Energy Consumption Consent Form

Customer Name: _____

Service Address: _____

Account Number:

The Sustainability Institute is working with Santee Cooper to help provide energy-efficient upgrades and weatherization services to our mutual customers. To ensure that our efforts are providing the necessary impact in terms of energy savings, we would like to have access to the past 12 months of your energy usage and the following 24 months of energy usage after the improvement has been made. This information is important to ensure we benefit our customers most.

I hereby acknowledge the document and grant access to The Sustainability Institute to view my energy usage of the past 12 months and following 24 months:

Homeowner Signature: _____ Date: _____

Thank you,

Bryan Cordell
Executive Director





THE SUSTAINABILITY INSTITUTE
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Consent to Enroll

Santee Cooper's Empower SmartRewards Program



Customer Name: _____

Service Address: _____

As a Prerequisite for participation in Sustainability Institute's Energy Assistance program, qualified households are required to enroll separately in the Empower SmartRewards program to be considered as eligible for weatherization assistance:

<https://www.santeecooper.com/programs-incentives/empowersmartrewards/>

SmartRewards is a demand response program that enables us to partner with you- our customers- to maintain reliability, manage electricity costs and reduce carbon emissions. After you enroll, we'll install a small device (switch) near your home's central heating a cooling system and/or electric water heater. The during periods of peak demand or system constraints, we'll cycle your equipment off and on temporarily to reduce electricity demand. Participants usually don't notice any change in their home's comfort and can opt out of to events per season.

Does the dwelling have an Electric Heat Pump or Water Heater?

YES NO

Households that check 'yes' and have electric fueled Heat Pumps or Water Heaters will be required to register for the program. Documentation must be included in the Sustainability Institute's Energy Assistance program application.

I hereby acknowledge the document and fully understand the requirements of Empower SmartRewards program. I will commit to provide the proper documentation within the program application packet.

Printed Name: _____

Homeowner Signature: _____ Date: _____