

Energy Efficiency Business Rebates

Overview

Energy Efficiency Business Rebates (EEBR) is sponsored by San Diego Gas & Electric® (SDG&E®) under the direction of the California Public Utilities Commission (CPUC). The 2010-2012 rebates may be modified or terminated without prior notice.

For purposes of EEBR, a vendor is defined as any third party payee listed on the rebate application. There are no license requirements associated with the use of this term. All license requirements, if any, are solely the responsibility of the vendor. Participating vendors include equipment contractors, equipment vendors, equipment manufacturers and distributors, energy service companies, etc.

The typical role of a vendor is to contact/solicit eligible customers and encourage the installation of energy-efficient equipment. Generally, the vendor will explain the rebate offerings and their benefits to the customer. The vendor will identify retrofit projects that would benefit the customer and, if an agreement is reached, the vendor will install the eligible equipment. A rebate reservation can be made prior to the purchase and installation of the equipment. See the rebate application for more information.

Guidelines for Vendor Activities

Vendors must sign and return the attached Vendor Participation Agreement prior to soliciting customer participation. A copy of this form must be on file with SDG&E. Rebate payments will not be released to a vendor unless a signed Vendor Participation Agreement is on file.



Vendors must not misrepresent the nature of their role or their relationship with SDG&E in connection with EEBR. In particular, vendors must not state or in any way imply to customers, or any person, that the vendor is employed by or working on behalf of SDG&E.

No vendor may represent or otherwise indicate that the vendor's products and/or services are approved, authorized or endorsed by SDG&E. SDG&E does not endorse any particular products, services or companies.

Vendors may use the "Energy Efficiency Business Rebates" name in promotional materials, advertisements or on the invoice. ***Vendors may not use the name or logo of SDG&E in any promotional literature, advertisements or writing of any kind without the express prior written approval of SDG&E.***

Energy Efficiency Business Rebates provide cash rebates to eligible customers for energy-efficient lighting, refrigeration, foodservice, natural gas and other technologies.

Vendors may advise a customer of the customer's option to have SDG&E make the customer's rebate check(s) payable to the vendor if the customer's rebate amount is being deducted from the total sale price in advance. Please note that the vendor's invoice must clearly show that the rebate is being deducted from the sales price with the customer's permission.

SDG&E reserves the right to limit a vendor's participation in EEBR if, in SDG&E's sole judgment, the vendor fails to comply with the EEBR guidelines and requirements.

Rebate Guidelines

EEBR has a limited budget. Reservations are strongly recommended to help ensure fund availability; however, a reservation does not guarantee a rebate. Please note that some measures require a pre-inspection. Vendors must ensure that all terms and conditions and requirements are met.

Rebate applications without reservations will be accepted on a first-come, first-served basis until rebate deadlines are reached or until allocated rebate funds are spent. All rebate applications must be postmarked or received by the date listed on the current EEBR application. All products must be purchased and installed within the date range listed on the current EEBR application. (See Section 7 - Terms & Conditions of the EEBR application for dates.)

Businesses may be eligible to participate even if they receive only distribution services from SDG&E. Co-generation, wind, solar, and other types of self-generation customers are eligible for rebates on a prorated basis if they purchase energy from SDG&E. Vendors cannot apply for other public goods charge rebates or incentives for the same measure.

Equipment must be installed and operational prior to the rebate application being submitted. The vendor must provide the customer with applicable equipment warranty information for all products installed.

All projects submitted for a rebate will be inspected for the sole purpose of verifying that the equipment is installed and operating before processing a rebate application for payment. Typically, re-inspections are not performed. If a vendor disputes inspection results, SDG&E may, at its discretion, perform an additional inspection. If an inspection does not pass due to failure to follow terms and conditions and rules, SDG&E may require the vendor to pay a \$200 re-inspection fee or 10% of the entire rebate, whichever is higher.

Vendor must comply with all applicable local, state, and federal laws when performing installation and related functions.

Vendors must sign the attached Vendor Participation Agreement prior to soliciting any customers. A signed copy



of this agreement must be on file at SDG&E before rebate payments will be released to a vendor.

Rebates are generally considered subsidies for tax purposes and could be taxable to the customer or the vendor receiving the rebate check. Vendors are urged to consult their tax advisors concerning the taxability of these rebates. Rebates greater than \$600 will be reported to the IRS on Form 1099 unless a vendor has checked corporation or exempt tax status. SDG&E is not responsible for any taxes that may be imposed on a vendor as a result of the vendor's receipt of a rebate under EEBR.

Please see the rebate application, the Product Catalog and the Policies and Procedures Customer Handbook for additional program requirements and a list of eligible measures.

SDG&E Rebates Overview

Contact us at **1-800-644-6133** before purchasing and installing equipment to confirm eligibility, reserve funds for your project and schedule a pre-inspection (if required).

Eligibility

Customers eligible for EEBR are defined as nonresidential commercial, industrial and agricultural customers.

The total rebate limit is \$350,000 per service account, per fuel, per calendar year. Customers with multiple service accounts or chain account customers may receive rebates for multiple projects; provided that each individual service account or site limit of \$350,000 is not exceeded. There is no limit on the number of service accounts that may participate.

Application Process

Benchmarking is required for all commercial business customers who participate in energy efficiency programs. Upon completion of the Portfolio Manager Benchmarking, you will receive a Statement of Energy Performance. Include this document with your EEBR application. In order to meet this requirement visit sdge.com/benchmarking or call us at **1-800-644-6133**.

Verify the measure(s) being applied for qualify by consulting the terms and conditions located in the Product Catalog. Some products require a pre-inspection. Please refer to the Product Catalog to verify. If a product requires a pre-inspection, contact us at 1-800-644-6133 prior to installation. Calculate the rebate amount. Purchase price includes material and installation labor. Sales tax and freight (shipping) are not included in the item's purchase price.

When applying for lighting measures, complete and submit the Lighting Worksheet with the existing and new equipment information. Calculate the Annual Hours of Operation (AHO). AHO are determined by the number of hours that the majority of lights are on in the facility. AHO will be verified through the post-installation inspections.

For every product applied for, a matching line item must appear on the invoice, including labor for items such as de-lamping. Under no circumstances will SDG&E pay more than 100% of the purchase price of the items to be rebated.

Submit the completed rebate application.

- ▶ Include a detailed itemized invoice on contractor/vendor letterhead marked "*Paid.*" Paid is defined as having a zero balance or meeting the terms of Net 30 or Net 60.
 - ✓ Description of installed product(s)
 - ✓ Make and model number of installed product(s)
 - ✓ Quantity
 - ✓ Unit cost
 - ✓ Location or project site of installed product(s)
 - ✓ Total job cost
 - ✓ Less rebate amount (if applicable)
 - ✓ Total due from customer
 - ✓ Vendor contact name and phone number

- ✓ Invoice date (must be dated within the date range listed in Section 10 - Requirements of the EEBR application to qualify)

- ▶ Include the manufacturers' specification sheet; make sure the spec sheet qualifies the product as detailed in the terms and conditions in the Product Catalog.

Additional Information

Ensure the rebate application is signed and dated by the customer. **Applications with any sign of correction fluid ('white out') used to change information will be returned to the customer or contractor.**

A rebate check for qualified products is generally mailed 45-60 days after SDG&E receives and approves a completed application including all required documentation, and verifies installation. Incomplete or incorrect applications cannot be processed and notification will be mailed.

Pre-made labels with contractor or customer information (name, address, etc.) are not accepted on rebate applications. However, a contractor stamp is acceptable, as long as there is no possibility of covering up existing information beneath the stamp.

If working with a factoring company, the contractor's name must appear as the payee in the 'Payment Information' section of the application. However, if the contractor and customer agree that the rebate can be mailed directly to the factoring company, the factoring company address can be listed under the contractor name. See example:

Payment Information
 ABC Contractor
 c/o XZY Factoring Company
 1234 Main St.
 San Diego, CA 92111

Also, if the factoring company has any questions regarding a rebate, they should contact the contractor directly for information as SDG&E will only supply rebate information to the customer or the contractor.



P.O. BOX 129831 SAN DIEGO, CA 92112-9831
1-800-411-SDGE (7343)
 sdge.com



Vendor Participation Agreement

Vendors who wish to participate in Energy Efficiency Business Rebates must complete this form. A signed copy of this form must be on file with SDG&E in order for the vendor to receive rebate payments if the vendor is the designated payee.

I have read and understand the Energy Efficiency Business Rebates Guidelines for Vendor Participation, and I agree to comply with all requirements set forth therein. By signing this agreement, I agree to provide my customers with information and documentation that is true and accurate to the best of my knowledge, and that the tax ID provided is an accurate representation of my company. I agree that any confidential information concerning my customer, including but not limited to utility account information, will be used for the sole purpose of facilitating the customer's participation in the 2010-2012 Energy Efficiency Business Rebates. Further, I understand that I am responsible for making sure everyone working for me understands the requirements of the Energy Efficiency Business Rebates prior to soliciting customer participation.

Vendor Type: Food Service Natural Gas Lighting Refrigeration
 Other Technologies _____

Vendor Federal Tax ID Number: _____

Vendor Federal Tax ID Status: Corporation Individual/Sole Proprietor
 Partnership Exempt

COMPANY NAME

MAILING ADDRESS

CITY/STATE/ZIP

PHONE/FAX

E-MAIL ADDRESS

X

VENDOR SIGNATURE TITLE

PRINT NAME DATE

- Contact me to learn about On-Bill Financing options available for customers
 Add me to your e-mail distribution list for rebate information

Mail this form to:
San Diego Gas & Electric
Energy Efficiency Business Rebates
Participating Vendor
P.O. Box 232440
San Diego, CA 92193-2440