

# **2010 Statewide Energy Efficiency Business Rebates Manual**

## **Program Overview and Policies**

**Utility Administrator:**

**Pacific Gas & Electric Company**

**San Diego Gas & Electric Company**

**Southern California Edison Company**

**Southern California Gas Company**

# Program Overview and Policies

1.1 Introduction .....	2
1.2 How the Rebate Offering Works .....	3
1.3 Eligibility for Participation.....	3
1.4 Qualifying Energy Efficiency Measures.....	4
1.5 Measure Cost.....	5
1.6 Aggregating Customer Project Sites .....	5
1.7 Rebate Limits .....	5
1.8 How to Apply .....	6
1.9 Application.....	7
1.10 Application Review .....	8
1.11 Application Approval.....	8
1.12 Rebate Payment.....	9
1.13 Other Important Terms and Conditions .....	9

## 1.1 Introduction

The 2010 Statewide Energy Efficiency Business Rebate Offering (Rebate Offering) provides rebates to offset the cost of replacing or upgrading to high-efficiency equipment. Non-Residential Customers that install energy-saving technology will be eligible for energy efficiency rebates, based on prescriptive measures. The Rebate Offering is administered by four of California's Investor-Owned Utilities (CIOU) — Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), and Southern California Gas (SoCal Gas). (Rebates for gas-related measures are eligible only in PG&E, SDG&E, and SoCal Gas natural gas service territories.)

Rebates are paid on the prescriptive measures as determined by the Utility Administrator. Non-Residential Customers, who wish to receive rebates, must submit a project application through the Rebate Offering process for installation of eligible energy efficiency measure(s).

The 2010 enrollment begins January 1<sup>st</sup> 2010. Applications are accepted throughout the program cycle or until the Utility's Rebate Offering funds are fully committed. Please check with the Utility Administrator for exact enrollment periods.

**Designed for Non-Residential Customers.** The Rebate Offering serves Non-Residential Customers who receive energy services from CIOUs and pay into the Public Goods Charge (PGC) or Public Purpose Program (PPP) surcharge.

**Offering Materials.** Rebate payments are based on careful adherence to offering requirements, please read the entire 2010 Rebate Offering Manual before starting a project.

**Changes for 2010.** Refer to Table 1-1 below for a list of specific program changes for 2010.

**Table 1-1. What's New in 2010**

**The Rebate Offering has been re-designed to offer a more comprehensive and consistent method for Utility customers to participate in statewide energy efficiency retrofit rebates. Please visit the respective Utility Administrator websites for detailed information.**

PG&E - <http://www.pge.com/businessrebates>

SCE - [http://www.sce.com/Express\\_Solutions](http://www.sce.com/Express_Solutions)

SDG&E - <http://www.sdge.com/business/rebatesincentives/>

SoCal Gas - <http://www.socalgas.com/energyefficiency>

## 1.2 How the Rebate Offering Works

### 1.2.1 The Main Players

The program involves three key parties:

1. **Customer (Applicant)** – An eligible non-residential ratepayer who is applying for rebates through the Rebate Offering.
2. **Utility Administrator**— PG&E, SCE, SDG&E, or SoCal Gas, whichever provides natural gas and/or electric services to the Customer Project Site.
3. **Project Sponsor** – An entity that is authorized to enter into a Project Agreement with a Utility Administrator. The Project Sponsor is responsible for ensuring all the required paperwork is submitted correctly and for ensuring the project is completed. Project Sponsors can also be known as the vendor or a trade professional.

For PG&E, SDG&E and SoCal Gas, customers can serve as their own Project Sponsor, i.e. “self-sponsor”, or may elect to have a third party enter into the agreement on their behalf.

For SCE, the difference is that a third party who enters into the agreement on the customer’s behalf is known as the Authorized Agent.

### 1.2.2 The Basic Process

The Rebate Offering works as follows:

1. **Project Reservation. (SDG&E and SoCal Gas only)** To ensure funding availability, you must reserve funds before you purchase and install equipment.  
Please call:
  - SoCal Gas - (800) 508-2348
  - SDG&E - 800) 644-6133
2. **Project Installation.** All project measure(s) must be installed, fully commissioned, and fully operational. For SCE, project installation after application submittal is allowed.
3. **Application Submission.** The Project Sponsor submits an application to the Utility Administrator. The application submission contains project details and any other supporting documentation as deemed necessary by the Utility Administrator. For SCE, if application submittal occurred prior to project installation, an installation report form is required to progress into the next phase.
4. **Application Review.** The Utility Administrator evaluates the application and may conduct site inspections, if required. The Utility Administrator may modify rebate claims as deemed necessary from review findings.
5. **Application Approval.** If the application is approved by the Utility Administrator, the rebate will be authorized for payment and be received shortly.
6. **Rebate Processing & Payment.** Upon payment approval and processing, the indicated Payee receives the rebate payment.

## 1.3 Eligibility for Participation

### 1.3.1 Customer Eligibility

The Rebate Offering is open to all Non-Residential Customers who (1) receive natural gas and/or electric services from PG&E, SCE, SDG&E or SoCal Gas and (2) pay the PGC or PPP surcharge on the gas or electric utility bill on which the energy efficient equipment is proposed.

### 1.3.2 Project Sponsor Eligibility

Customers may self-administer their own projects or projects can be sponsored by outside parties such as energy efficiency service providers (EESPs), which include energy service companies (ESCOs), lighting installers, HVAC contractors, consulting engineers, energy management companies or other entities. **The Utility Administrators do not qualify Project Sponsor; the Customer bears full responsibility for selecting a Project Sponsor if one is desired.**

### 1.3.3 Project Eligibility

In order for the project to be eligible for the Rebate Offering it must meet the following criteria:

1. Any measure must be installed, fully operational, and properly commissioned prior to the Application Submittal phase or the measure may be deemed ineligible by the Utility Administrator for rebates. For SCE, measures must be installed, fully operational, and properly commissioned prior to the Application Review phase or the measure may be deemed ineligible.
2. Any measure applying for rebate must provide proof of payment, specification documentation and other relevant materials as deemed relevant by the Utility Administrator.
3. When Non-Utility supply is involved; any energy savings for which rebates are paid cannot exceed the net potential benefit provided to the Utility. Non-utility supply, such as cogeneration or deliveries from another commodity supplier, does not qualify as usage from the utility (with the exception of Direct Access customers or customers paying departing load fees for which the utility collects PGC OR PPP surcharges).

## 1.4 Qualifying Energy Efficiency Measures

The Rebate Offering accepts a wide variety of prescriptive energy-saving measures. All measures must meet the following criteria as deemed reasonable by Utility Administrator:

1. **Be Utility Approved Measures.** For a measure to qualify for rebates, it must be included in the list of approved measures provided by the Utility Administrator.
2. **Meet Measure Terms and Conditions.** Any measure applying for Rebate Offering rebates must comply with measure terms and conditions. Terms and conditions are subject to change..
3. **Utilize New Equipment.** Only new equipment installations qualify for the prescriptive rebates, unless otherwise explicitly communicated by the Utility Administrator.
4. **Replace Existing Equipment.** Proposed equipment must be replacing existing equipment to qualify for prescriptive rebates, unless otherwise explicitly communicated by the Utility Administrator.
5. **Cannot Rebate Previously Rebated Equipment.** Retrofit projects where proposed equipment installed is the same as the equipment being replaced does not qualify, unless explicitly communicated by the Utility Administrator. For example, a customer who receives a rebate for installing an Interior Induction Fixture one year cannot receive another rebate the following year to replace the same Interior Induction Fixture.
6. **Operational Period.** The Customer must provide Utility with 100% of the related energy benefits specified in the project application for the effective useful life of the product or for a period of five (5) years from receipt of rebate, whichever is less. The Utility Administrator may request a refund of the prorated amount of rebate dollars based on the actual period of time for which the energy benefits did not materialize.
7. **Measures Cannot Overlap Other Rebate Programs.** Any measures included in the application cannot be applied through multiple California energy efficiency incentive or

rebate programs. Gas and Electric components should be considered separately. Other California end user energy efficiency programs include, but are not limited to, any program offered by or through the PG&E, SCE, SDG&E, SoCal Gas, California Energy Commission (CEC), and California Public Utilities Commission (CPUC), including PGC OR PPP funded local programs, third-party programs, or local government partnerships. Applicants cannot receive rebates from more than one energy efficiency program for the same measures.

## 1.5 Measure Cost

Measure cost is the cost of the proposed equipment(s) being installed as itemized in the proof of payment. Proof of payment may include invoices, purchase orders, lease agreements, or any other forms of acceptable documentation as deemed necessary by the Utility Administrator. Tax, shipping, and other secondary costs must not be included in the measure costs. Under certain conditions, labor cost may be applied as part of the measure cost.

The Utility Administrator will not pay more than 100% of the actual purchase price of the items to be rebated or the maximum rebate allowance per unit.

## 1.6 Aggregating Customer Project Sites

A Rebate Offering application may comprise of a single energy efficiency measure or a variety of measures. A Project Sponsor may choose to include multiple project sites in a single project application.

The following requirements apply:

- The same Customer must own and/or occupy the project sites.
- There is no limit on the number of sites that can be aggregated.
- Each site can have entirely different measures.
- If the same measures are installed across multiple sites, the Project Sponsor must indicate the measure quantities per site. This information must be included in the Proof of Payment or attached as a separate sheet.
- Project sites for which the Customer is applying for rebates **must be in the same service territory as the Utility Administrator**.

When combining sites and measures into a single application, the Applicant should be aware that such projects will not be reviewed, or approved, or receive payment until paperwork on all the individual sites and measures is complete. If the project is being implemented in phases, consider submitting individual applications.

## 1.7 Rebate Limits

The rebate payment amount is based on the number of measures approved at the prescriptive rates, as determined by the Utility Administrator.

### 1.7.1 First Come, First Served

Program funds are available on a first-come, first-served basis. Rebates may not be paid once Rebate Offering funds are fully committed.

### 1.7.2 Customer Rebate Caps

The Rebate Offering measure rebates are capped at the following:

- 1) The maximum rebate per measure is 100 percent of the total measure cost.
- 2) The maximum rebate per customer per year is specific to each Utility..

**PG&E** does not have a rebate cap on the maximum rebate amount per customer per year.

**SCE** has a total rebate cap of \$2,000,000 per customer, per calendar year.

**SDG&E** has a total rebate cap of \$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. Under no circumstances will rebates exceed 100% of the purchase price of the item.

**SoCal Gas** has a rebate cap of \$200,000 per customer, per program year. Customers with corporate (multiple) accounts cannot exceed \$200,000 per corporation or chain account customer, per year. Greenhouse heat curtain rebate cannot exceed the lesser of: \$50,000 per account per year, or 50% of the accounts preceding 12 month's natural gas consumption (therms) x \$0.80 (average prorated if less than 12 months usage is available). Boiler and large instantaneous water heater rebates cannot exceed \$25,000 per unit, subject to the maximum \$200,000 rebate limit per customer, per year.

Please contact your Utility Administrator for details.

## 1.8 How to Apply

Applicants can contact the Utility Administrator for assistance in completing their applications and to obtain answers to specific program questions. Table 1-2 lists the Rebate Offering contact information for each Utility Administrator.

**Table 1-2. Utility Administrator**

Utility Administrator	Program Representative
<b>Pacific Gas and Electric</b> <a href="http://www.pge.com/businessrebates">http://www.pge.com/businessrebates</a>	PG&E Business Rebates Integrated Processing Center (IPC) P.O. Box 7265 San Francisco, CA 94120-7265  Business Customer Service Center Phone: (800) 468-4743 <a href="mailto:businesscustomerhelp@pge.com">businesscustomerhelp@pge.com</a>
<b>Southern California Edison</b> <a href="http://www.sce.com/Express_Solutions">http://www.sce.com/Express_Solutions</a>	Southern California Edison Business Incentives P.O. Box 800 Rosemead, CA 91770  Phone: General Assistance - (800) 736-4777 Fax: (626) 633-3243 <a href="mailto:BusinessIncentives@sce.com">BusinessIncentives@sce.com</a>

<p><b>San Diego Gas &amp; Electric</b>  <a href="http://www.sdge.com/business/rebatesincentives/">http://www.sdge.com/business/rebatesincentives/</a></p>	<p>San Diego Gas &amp; Electric          PO Box 232440          San Diego, CA 92193-2440</p> <p>Energy Information Center          Phone: (800) 644-6133  <a href="mailto:EIC@semprautilities.com">EIC@semprautilities.com</a></p>
<p><b>Southern California Gas</b>  <a href="http://www.socalgas.com/energyefficiency">http://www.socalgas.com/energyefficiency</a></p>	<p>Southern California Gas Company          Attn: C/I energy Efficiency Rebates For Business          P.O. Box 513249 ML 28H2          Los Angeles, CA 90051</p> <p>Business Customer Service Center          Phone: 1-800-GAS-2000</p> <p>Energy Information Center          Phone: (800) 508-2348</p> <p>EERebatesforBusiness@socalgas.com</p>

### 1.8.1 Overview of Paperwork

To receive Rebate Offering rebates, the Project Sponsor must perform certain actions, and submit applications and supporting materials at specific project milestones:

1. **First milestone: Application**

The application describes the project and indicates those proposed measures which are being submitted for rebates. If measure installation has occurred, proof of payment, specification documentation, and other supporting materials deemed necessary by the Utility Administrator will need to be submitted.

2. **(SCE-Only) Second milestone: Installation Report (if applicable)**

If installation did not occur at time of application submission, the Project Sponsor submits an Installation Report (IR) to the Utility Administrator after the new equipment is installed and fully commissioned and fully operational. At this time, proof of payment, specification documentation, and other supporting materials deemed necessary by the Utility Administrator will need to be submitted. The Utility Administrator cannot schedule an inspection without a submitted and signed IR.

### 1.8.2 Paper or Electronic Forms

There are two ways to fill out the Rebate Offering paperwork:

1. **On paper**, using hardcopy forms (a) obtained from your Utility Administrator or (b) downloaded from the Utility's energy efficiency website.
2. **Electronically**, through interactive Rebate Offering software on the Utility's website or via email. Even with this method, SCG still requires that the customer prints the application, signs, and mails it in. An original wet signature is required.

## 1.9 Application

The project application is outlined for each Utility below:

### 1.9.1 Pacific Gas & Electric Company (PG&E)

<http://www.pge.com/businessrebates>

OR apply online at <http://www.pge.com/erebates>



### **1.9.2 Southern California Edison (SCE)**

[http://www.sce.com/Express\\_Solutions](http://www.sce.com/Express_Solutions)

### **1.9.3 San Diego Gas & Electric (SDG&E)**

<http://www.sdge.com/businessrebates>

### **1.9.4 Southern California Gas (SoCal Gas)**

<http://www.socalgas.com/business/rebates>

## **1.10 Application Review**

The application review is the basis for the approval of the application.

### **1.10.1 Post-Installation Site Inspection (if required)**

Upon receipt of the application or installation report, the Utility Administrator may schedule a post-installation site inspection at the customer project site. If a post-installation site inspection is required, the Utility Administrator will verify that the new measures are installed, fully commissioned and fully operational or the measures may fail inspection.

The Project Sponsor should be flexible in scheduling such inspections and provide complete access to customer project site(s).

A representative of the Project Sponsor who is familiar with the project, e.g. the facility manager or other responsible representative of the Customer, should attend the inspection. If the inspection cannot be completed in a timely manner, the measure(s) at the site may fail the inspection.

If the measure(s) fails the inspection, the Utility Administrator may decline the application. Also, the Utility Administrator may assess a \$200.00 fee if re-inspections are conducted.

### **1.10.2 Partial Installation**

Partial installations will result in partial rebate payment for the qualifying equipment that is installed, fully commissioned, and fully operational. If the remaining portion of the equipment is later installed, fully commissioned, and made fully operational, a separate (new) application must be submitted for that equipment.

## **1.11 Application Approval**

The application approval is the basis for initiating the rebate payment processing.

### **1.11.1 Notice of Application Review Results**

The Utility Administrator will provide the Project Sponsor written notice of the application review results, as follows:

- **Approved.** The approval letter/email informs the Project Sponsor that the application has been approved for rebate payment processing under the terms of the Rebate Offering. The approval letter will also inform the Project Sponsor of the approved measure rebate amount. For PG&E, SDG&E, and SoCal Gas, no acceptance letter is sent.
- **Incomplete/Declined.** An application may be declined or returned if any of the following conditions apply:
  - the installation is not consistent with the application;

- the project fails inspection(s);
- the project is missing information that the Project Sponsor is unwilling or unable to provide;
- the project otherwise fails to meet program criteria.

## 1.12 Rebate Payment

### 1.12.1 Payment Schedule

For most projects, 100 percent of the approved rebate amount is paid after the Utility Administrator approves the application and processes the rebate. Unless a project application is selected for verification, the rebate payment is generally mailed 4-8 weeks after the completed application is received, including all required documentation.

### 1.12.2 Payment Disbursement

The Utility Administrator will determine the rebate payment based on its review of the submitted paperwork and/or site inspection(s). The Utility Administrator will, upon approval of the application, begin processing the rebate. As soon as the rebate is processed, the Utility Administrator will mail it to the Payee designated on the application. If the Project Sponsor disputes the findings of the review, the Project Sponsor should notify the Utility Administrator as soon as possible.

## 1.13 Other Important Terms and Conditions

By virtue of participation in the program, Customers, Project Sponsors, and Authorized Agents agree to the following terms and conditions:

1. All parties consent to participate in any evaluation of the program. The CPUC or its representatives may contact participants to answer questions regarding their Rebate Offering experience and/or request a site visit. All participants agree to comply with such program evaluations.
2. Utility Administrators expressly reserve all their rights, which include, but are not limited to, the right to use others to perform or supply work of the type covered by the Rebate Offering, as well as the unrestricted right to contract with others to perform the work or to perform any such work themselves. Utility Administrators may employ third-party engineering firms to conduct site inspections. The information reviewed is considered confidential and is not shared with any party outside the application, other than the California Public Utility Commission as requested.

The CPUC has decided that the Utilities should continue to administer the program through the end of 2012. After December 31, 2012, existing program Agreements might be assigned to a new Administrator. In their program Agreements, Applicants must agree to terms and conditions allowing for such a transfer.

### Notice of Public Record

Participants should be aware that, because the program is funded by the PGC OR PPP surcharge, Rebate Offering projects are a matter of public record and may be reviewed and evaluated by the CPUC upon program commencement. The estimated total project costs will be part of the public record. The Utilities may discuss projects and disclose project information among program administrators (PG&E, SCE, SDG&E, and SoCal Gas) to ensure statewide consistency and eligibility, as necessary. However, projects are not shared or available for

viewing by other customers or sponsors, and information about specific projects is not divulged to parties not included on the application.

The Utility Administrators are not liable to any Project Sponsor, Customer, Authorized Agent or other party as a result of any public disclosure to the CPUC for the purpose of Measurement and Evaluation.

### **Change in Sponsorship (SCE only)**

If a change in sponsorship occurs after the application is submitted, a new Rebate Offering application is required. Please indicate the change request in writing to the Utility Administrator, and resubmit the required forms. Written notification is also required from the original Project Sponsor or Authorized Agent/Customer. If written notification is not possible, (i.e. the sponsor is no longer in business or non-responsive) the Applicant must submit a letter in writing requesting termination of the Project Sponsor or Authorized Agent/Customer to act on their behalf.

### **Contract Termination**

Rebate Offering contracts may be terminated by Utility Administrator under the following conditions:

- The Utility Administrator determines that significant information was purposely withheld or falsely stated in the Project Application.
- The project fails to be installed, fully commissioned, or fully operational prior to the installation deadline.
- The Project Sponsor formally requests withdrawal from the program, or requests the contract to be turned over to the Customer.
- The Customer requests withdrawal from the program.

### **More Information**

For more information on PG&E's rebates and incentives for your business visit [www.pge.com/businessrebates](http://www.pge.com/businessrebates). In addition to rebates you can find a wide range of tools and resources at [www.pge.com/mybusiness/energysavingsrebates](http://www.pge.com/mybusiness/energysavingsrebates).

For more information on SCE's rebate and incentive offerings for business customers, please visit [http://www.sce.com/express\\_solutions](http://www.sce.com/express_solutions).

For more information on SDG&E's rebates and incentives for your business visit <http://www.sdge.com/business/rebatesincentives>.

For more information on Southern California Gas Company's rebates for your business please see our customer handbook at <http://www.socalgas.com/business/rebates>.