

On-Bill Financing Option

Vendor Participation Guidelines

On-Bill Financing Option Overview

SDG&E's On-Bill Financing (OBF) Option provides interest-free, unsecured financing to qualified commercial and taxpayer-funded customers for the installation of energy-efficient improvements. Financed equipment must qualify for a rebate or incentive from SDG&E's rebate/incentive program(s). OBF loan installments are billed on customers' monthly SDG&E® bills.

OBF Guidelines for Vendor Activities

For this purpose the word "Vendor" is the person or entity performing the work for the Customer pursuant to Vendor Participation Guidelines.

All rebate and incentive program-related activities and inquiries should be directed to rebate/incentive program staff, including:

- Rebate and savings calculations
- Measure guidelines
- Rebate/incentive payments

OBF Applications will not be approved unless a signed Vendor Participation Agreement is on file.

Vendors must participate in an OBF Vendor Training Session prior to soliciting customer participation. The OBF Vendor training includes: OBF program features and parameters; Customer eligibility; the use of any necessary program support software; OBF Vendor roles and responsibilities; program requirements and qualified equipment for SDG&E rebate/incentive programs.

Vendor must provide Customers with applicable equipment warranty information for all measures installed.

Vendor must submit a final detailed, itemized invoice on Vendor letterhead including:

- √ Description of existing and make/model of installed measure(s)
- √ Quantities
- √ Unit Cost (identify equipment cost and installation cost separately)
- √ Location or project site of installed measure(s)
- √ Total Job Cost (This must be **all-inclusive**: i.e. lamp recycling, labor, tax, freight, etc.)
- √ Rebate/Incentive with a rebate/incentive reduction where applicable
- √ Total Due from Customer
- √ Vendor contact name, phone number and e-mail address

All OBF projects will be inspected to verify that the equipment is installed and operating before SDG&E initiates processing the rebate/incentive/OBF 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 program guidelines, SDG&E may require the Vendor to pay a \$200 re-inspection fee. (This fee is not to be included in the project cost). Vendor must comply with all applicable local, state, and federal laws when performing installation and related functions.

OBF Project Guidelines

All OBF projects must include a completed OBF application. Incomplete applications will not be processed. In an effort to achieve comprehensive energy savings, Vendor is encouraged to identify all opportunities for energy-efficiency retrofits.

For approved Customer accounts, SDG&E will perform a project review to calculate energy savings and determine project payback and loan terms.

Once the loan agreement is signed by all parties, SDG&E will notify both Customer and Vendor to begin the installation process. Due to Customer bill impacts, installation of a project must be completed within 45 days from the date of the **Customer's** signed loan agreement. All installations must conform to all proper codes and permits and include removal of hazardous material. All work will be performed with minimal interruption of the Customer's business hours. All unused and waste material i.e. old lamps, ballasts, etc. should be removed upon completion of a project and the area left clean.

Immediately following completion of installation, Vendor is required to submit a final invoice and the required rebate/incentive program forms. This content will be reviewed and sent for post inspection and payment. In the event that any required forms are not submitted, or are incomplete, Vendor will have 30 days to revise and resubmit documentation. SDG&E reserves the right to cancel financing if final forms are not resubmitted within 30 days.

SDG&E does not endorse or recommend any Vendor and does not review Vendor proposals. Vendor must not misrepresent the nature of their role or their relationship with SDG&E or the On-Bill financing Option. In particular, Vendor must not state or in any way imply to Customers, or any person, that the Vendor is employed or working on behalf of SDG&E.

No Vendor participating in these programs may represent or otherwise indicate that products and/or services are approved, authorized or endorsed by SDG&E. SDG&E does not endorse any particular products, services or companies. SDG&E shall have no liability in connection with, and makes no warranties, expressed or implied, regarding work performed or Vendor-Customer contracts; nor is SDG&E in any way liable for any claims, damages, fines, settlements or judgments regarding any Vendor/Customer contracts, or work performed. SDG&E reserves the right to limit or cancel Vendor participation in the On-Bill Financing Option if, in the utility's sole judgment, the Vendor fails to comply with program guidelines and requirements.

Vendor Participation Agreement

I have participated in OBF training and agree to the Vendor guidelines.

Signature

Date

Print Name/Title

Company

Training Date

On-Bill Financing is provided to eligible Customers on a first-come, first-served basis until program funds are no longer available. OBF is funded by California utility Customers and administered by SDG&E® under the auspices of the California Public Utilities Commission.