



San Diego Gas & Electric Company
San Diego, California

Original Cal. P.U.C. Sheet No. 16568-E

Canceling _____ Cal. P.U.C. Sheet No. _____

SAMPLE FORMS
FORM 142-05213

Sheet 1 N
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TECHNICAL ASSISTANCE INCENTIVE APPLICATION

(07/03)

(See Attached Form)

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Advice Ltr. No. 1507-E-A

Decision No. 03-06-032

Issued by
Lee Schavrien
Vice President
Regulatory Affairs

Date Filed Jul 11, 2003

Effective Aug 8, 2003

Resolution No. _____



Technical Assistance Incentive Application

Date: _____

For Utility Use Only	
Date Received :	_____
Date of First Payment/Amount:	_____
Date of Second Payment/Amount:	_____
Date of Non-Compliance Notification:	_____

CUSTOMER INFORMATION

Company Name: _____

Name As It Appears On Your Utility Bill: _____

Contact Name: _____

Address: _____

City: _____ Zip: _____

Phone: _____ Fax: _____ Email: _____

- Tax Status: (check one)
- Individual/Sole Prop.
 - Corporation
 - Partnership
 - Exempt
- Participating In:
- Critical Peak Pricing (CPP) Program
 - Demand Bidding Program (DBP)
 - Hourly Pricing Option (HPO)

SITE INFORMATION

Site Name: _____

Address: _____

City: _____ Zip: _____

Site Contact Name: _____ Contact Phone #: _____

Elec. Service Acct. or ID: _____

Facility Type: _____
(Office, Hospital, etc.)

Facility Area: _____ Facility Age: _____ Number of Floors: _____

INCENTIVE PAYMENT INFORMATION

Incentive check should be made payable and sent to the following:
(checks CANNOT be made payable to a non-related third party)

Company Name: _____

Mailing Address: _____

City: _____ State: _____ ZIP: _____

Telephone Number: _____ Fax Number: _____

Fed Tax ID Number: _____

TECHNICAL ASSISTANCE REPORT

Engineer Firm: _____

Date of Report: _____

Signature: _____

Print Name: _____

P.E. License Number: _____

P.E. Certification Stamp



Technical Assistance Incentive Application

Customer Acknowledgements

I, _____, on behalf of _____ (name of company), hereby acknowledge the following:

_____ (name of company) (hence forth referred to as the "Customer") has entered into a contract with a Professional Technical Assistance Engineer, who is on the California Energy Commission's (CEC) approved list of engineering firms, for professional technical advice regarding the installation of new equipment or modification of existing equipment or behavior at the Project Site listed on the front of this application (the Project). Of the recommendations that were presented in Customer's report from the Professional Technical Assistance Engineer, the Customer has implemented the measures that are listed to achieve the Customer's committed demand reduction for the Critical Peak Pricing Program, Demand Bidding Program, and/or Hourly Pricing Option (SDG&E only) Program, that the Customer is participating in. The Customer understands that they may not increase the amount of certified load reduction identified by the engineering firm; however, the Customer may choose a lesser amount and is ultimately responsible for the load reduction stated on this application.

The Customer understands that the Technical Assistance Incentive of \$50 per kW of potential curtailable on-peak load, up to 100% of the study cost, applies to the cost of the study only by the CEC-approved engineer, and not for the installation of permanent equipment. The Customer understands that the Technical Assistance Incentive will be paid in two parts. The first part of the incentive (\$25 per kW up to 50% of study cost) will be paid after the Utility receives this completed application; a copy of the study by the CEC-approved engineer; and a copy of a paid invoice. The second part of the incentive (\$25 per kW up to 50% of study cost) will be paid after the customer meets the compliance criteria (for performance in the first four consecutive summer months for the CPP/HPO program or after the first two DBP events or tests in which the customer reduces load within program guidelines) as stated in the applicable tariff. The measurement and evaluation of compliance for the second part of the incentive will commence on the date that the check is issued for the first part of the incentive. Customers who fail to meet the criteria of the second part of the incentive will not receive the remainder of the payment. Incentive payments will be paid out on a first-come, first-served basis upon Customer's completion of all requirements. No Technical Assistance Incentives will be paid beyond December 31, 2005, or after the California Public Utilities Commission approved incentive funds are depleted, whichever comes first.

The Customer has signed an Authorization to Receive Customer Information or Act on a Customer's Behalf Form that grants the CEC, or its agent, the ability to gather energy data directly from the Customer's electric meter, or through the Utility's designated Internet site.

The Customer agrees that the Utility Administrator will have no role in resolving any disputes between the Professional Technical Assistance Engineer and the Company.

The Customer understands that as a condition of being on the Program, inspections and measurements of the performance of the Measures installed may be required. Therefore, the Customer agrees to provide access to the Project Site for these purposes to the CEC, the Utility Administrator, or its contracting agent, during the Customer's participation in a demand response program.

The Customer has authority to contract, on behalf of the legal owners of the Project Site, for installation of the Measures, or the Customer has obtained the permission of the legal owner of the Project Site to install the Demand Response Measures under the Customer's contract with the Professional Technical Assistance Engineer.

The Customer agrees to release the Utility Administrator, its affiliates, subsidiaries, parent company, officers, managers, directors, agents, and employees from all claims, demands, losses, damages, costs, expenses, and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, including but not limited to employees of the Utility Administrator, Customer, or Professional Technical Assistance Engineer; (2) injury to property or other interests of the Utility Administrator, Customer, Professional Technical Assistance Engineer, or any third party; (3) violation of local, state, or federal common law, statute, or regulation, including but not limited to environmental laws or regulations; (4) energy savings shortfall; so long as such injury, violation, or shortfall (as set forth in (1) - (4) above) arises from or is in any way connected with the Project, including Professional Technical Assistance Engineer's performance of or failure to perform the Project, however caused, regardless of any strict liability or negligence of the Utility Administrator, its officers, managers, or employees.

The Customer understands that the Utility Administrator has made no warranty or representation regarding the qualifications of the Professional Technical Assistance Engineer, and that we are solely responsible for the selection of the Professional Technical Assistance Engineer to implement the Project. The Customer understands that the Professional Technical Assistance Engineer is an independent engineer and is not authorized to make any representations on the behalf of the Utility Administrator.

Customer Signature: _____

Date: _____

Customer Name (Please Print): _____

----- PLEASE MAKE A COPY OF THIS DOCUMENT FOR YOUR RECORDS -----

CPP, DBP and HPO Technical Assistance Incentive Process
Joint UDC Proposal

Summary: The UDCs advocate one proposal that utilizes both the CEC's Enhanced Automation program as well as the expert analysis of CEC authorized Engineering firms to conduct audits for the customers. The UDCs will not require that a customer first enroll in either the Demand Bidding Program, Critical Peak Program or SDG&E's Hourly Pricing Option before submitting an application for the Technical Assistance Incentive. However, the customer will be required to sign up for one of these programs before being eligible for or receiving any technical incentive payments.

Process:

Marketing/Rate Analysis:

- UDC's will market programs to Reps and perform a preliminary rate analysis for customer to determine if customer is a good candidate for the rate.

Enhanced Automation Program:

- At the same time that the UDCs promotes the program to the customer, they will also notify customers of the availability of the CEC Enhanced Automation program to help the customer pre-determine their load reduction potential without incurring any costs.
- The customer may choose to contact Xenergy via the web or through the 800 number to sign up for the Enhanced Automation program to 'pre-certify' their load. At that time, the customer may choose among three options:
 - A phone consultation;
 - ½ day site visit; or
 - one day site visit.

Technical Assistance Incentive:

- Customers interested in receiving additional technical assistance beyond the services provided by the utility service representative or the Enhanced automation program will be referred to the list of qualifying firms in the Technical Assistance program. Customers can contact a CEC-certified engineering firm directly or ask for assistance from their UDC Rep. The UDC Rep can help facilitate the customer applying for a full engineering analysis so that they can enroll in the Technical Assistance Incentive.
- Customer selects among the CEC-approved Engineering firms and requests a Demand Reduction Engineering Analysis.
- Customer schedules a meeting with engineering firm to conduct engineering analysis. UDC Representative should be available to help facilitate the meeting if requested by the customer
 - Engineering firm conducts study, provides recommendations on how customer could reduce peak during CPP/DBP events (including both changes in building controls or operation as well as investments in new equipment), and helps customer determine which of the Engineering firms recommendations will be implemented. Ultimately, the customer determines which recommendations will be included on the Technical Assistance Incentive Application and provides to the UDC the amount of load reduction to they plan/pledge to be achieved.
- Customer receives Engineering Report from Engineering Firm and signs Technical Assistance Incentive Application. The application specifies:
 - Account Name, Service Address, Account Number, Meter number, etc/

CPP, DBP and HPO Technical Assistance Incentive Process
Joint UDC Proposal

- The recommended load reduction activities to be implemented;
- The nominated load reduction amount associated with recommended load reduction demand responsiveness activities to be implemented. (The engineering firm will recommend a certified amount of load reduction; the customer may choose to include this amount on the Technical Assistance Incentive Application or to choose a different amount defined as the 'nominated' load reduction amount to be included on the Application form.)
 - *Customers may not increase the amount of peak-load reduction identified by the Engineering Firm; however, they may choose a lesser amount and are ultimately responsible to get the load they are capable of curtailing on the Technical Assistance Incentive Application.
- Engineering firm helps customer to distinguish which measures qualify as curtailable load reductions for nomination.
- Engineering firm certifies Application (P.E. stamp) and bills customer for the Engineering report.

Customer Enrolls in DBP, CPP, or HPO:

- Customer enrolls in the Demand Bidding Program, Critical Peak Pricing or SDG&E's Hourly Pricing Option by contacting their UDC Representative.
- Customer provides the UDC Representative:
 - An original signed Technical Assistance Incentive Application with PE stamp;
 - A certified copy of the Engineering Analysis; and
 - A copy of the Engineering Firm's invoice for the analysis.
- UDC Representative verifies that measures nominated are curtailable load reductions eligible for incentive payments.
- UDC Representative provides information to UDC Program Administration. Program Admin logs into database that customer has a signed Technical Assistance Incentive Application and the nominated load reduction.
- UDC Program Administrator verifies that customer is an active participant in DBP, CPP or HPO.

UDC Issues First Payment:

- UDC issues customer a check for \$25 per kW (up to 50% of study cost) of nominated load reduction after verifying the information in the application is complete and the engineering firm is on the list.

UDC Tracks Customer Performance:

- UDC tracks customer performance as required in the DBP, CPP and HPO tariffs.
- For CPP participants, once 4 CPP months are completed (if a SDG&E customer was enrolled September 1st, the time period is: Sept 2003, June 2004, July 2004 and August 2004), UDC Program Admin calculates whether the customer complied by reducing their peak load by at least 50% of the nominated load reduction.
- For DBP participants, the UDC Program Admin will calculate whether the customer complied with reducing at least 50% of the nominated load reduction after each event. The Technical Assistance Incentive will be issued once the customer has complied with the 50% criteria in two DBP events.

CPP, DBP and HPO Technical Assistance Incentive Process
Joint UDC Proposal

UDC Issues Second Payment:

- If the customer achieved peak reductions greater than 50% of the nominated load reduction in the application, the UDC Program Admin issues a check for the remaining \$25 per kW (up to 50% of study cost).
- If the customer did not achieve the 50% threshold of peak reduction, the customer does not receive any additional payments, but is able to keep the initial payment.

UDC tracks Program Compliance:

- UDC Program Admin tracks compliance within database.

Assumptions:

- 1) Customers may certify one service account or qualifying meter at a time, or multiple qualifying service accounts or meters. If, at a later date, the customer decides there are more qualifying accounts and wishes to enroll them in the Incentive program, they may enroll.
- 2) Customers may not receive more than one Incentive payment for the same meter/service account regardless of whether the account is enrolled in both DBP and CPP.
- 3) No Technical Assistance Incentives will be paid beyond December 31, 2005, or after Commission approved incentive funds are depleted, whichever comes first.
- 4) UDC Representative will help facilitate process if requested by customer.