

# 2019 Trade Professional Alliance

## PARTICIPATION AGREEMENT

### What is the Trade Professional Alliance?

SDG&E's Trade Professional Alliance consists of vendors, contractors, manufacturers, installers, energy consultants and more.

### Benefits for Trade Alliance Members

By joining the Trade Alliance, Trade Professionals may:

1. Apply for rebates and incentives on behalf of Customer (when authorized by Customer)
2. Receive electronic newsletter on the latest program updates for rebate, incentive and On-Bill Financing (OBF) programs
3. Invitation to Trade Professional related events and seminars to promote program collaboration and positive working relationships with other Trade Professionals

### TO JOIN THE 2019 TRADE PROFESSIONAL ALLIANCE

#### Non-Payee Requirements:

1. Attend the Trade Professional Program Essentials training
2. Complete the 2019 Trade Professional Alliance Participation Agreement

#### Payee Requirements:

1. Attend the Trade Professional Program Essentials training
2. Complete the 2019 Trade Professional Alliance Participation Agreement
3. Complete, sign with a handwritten signature and submit tax forms:
  - W9
  - 587 - Required for businesses established outside of the state of California
  - 590 - Required for businesses within the state of California
  - Active CSLB (California State License Board)

**Failure to submit the required aforementioned forms or attend the Trade Professional Program Essentials training could result in a delay of Trade Ally set-up and/or rebate, incentive/OBF payment(s).**

### This Trade Professional Alliance Participation Agreement

This Trade Professional Alliance Participation Agreement ("Agreement") is between San Diego Gas & Electric ("SDG&E" or "Utility") and

(insert Trade Professional official business name).

### PARTICIPATION REQUIREMENTS

1. Trade Professional shall not state or in any way imply to the customer or any other person that the Trade Professional is employed or is working on behalf of SDG&E. SDG&E does not endorse or recommend Trade Professional and does not review Trade Professional's proposals. Trade Professional must not misrepresent the nature of their role or their relationship with SDG&E.
2. Trade Professional shall not represent or otherwise indicate that any product and/or services provided by the Trade Professional or any third party are approved, authorized or endorsed by SDG&E. SDG&E does not endorse any products, services, or companies. SDG&E disclaims all liability in connection with, and makes no warranties, express or implied, regarding work performed by Trade Professional, nor shall SDG&E be in any way liable for any claims, damages, fines, settlements or judgments arising from or associated with Trade Professional contracts or work performed under such contracts. Trade Professional shall defend, reimburse, indemnify and hold SDG&E and its current and parent company subsidiaries, affiliates, and their respective directors, officers, shareholders, employees, agents, representatives, successors and assignees harmless for, from, and against any and all claims, losses, fines, or damages of any type, including but limited to Trade Professional's act or omissions in breach of this Agreement. Trade Professional shall not use SDG&E's name or logo in any promotional literature, advertisements or writing of any kind without the express prior written approval of SDG&E, which is not being provided under this Agreement.
3. Trade Professional shall comply with all applicable local, state, and federal laws, rules, regulations and orders in its performance of service or work for any customer under this Agreement.

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All unused and waste materials (i.e., old lamps, ballasts, etc.) should be removed upon completion of a project and the area left clean. Trade Professional shall provide customers with applicable equipment warranty information for all measures installed.

### **TRADE PROFESSIONAL CODE OF CONDUCT**

In exchange for permission to participate in SDG&E's Energy Efficiency programs, Trade Professional shall not:

#### **1. Misrepresent Role/Relationship with SDG&E**

Including but not limited to: stating in writing or verbally that Trade Professional is an agent for Utility or otherwise 'approved' by Utility. Trade Professionals shall not use the SDG&E name or logo in any promotional literature, advertisements, email address or writing of any kind without the express prior written approval of SDG&E.

#### **2. Misrepresent SDG&E Energy Efficiency Programs**

Including but not limited to: giving a guarantee of savings and/or rebates, stating OBF program is no cost/free.

#### **3. Provide Fraudulent Documentation**

Including but not limited to: use of white out, forgery of signatures, altering program forms, completing customer information on OBF loan agreement on customer's behalf, having customer sign incomplete forms, falsifying scope of work and invoices, copying and distributing of OBF forms, submitting rebate applications for measures that are not installed, etc.

#### **4. Provide Poor Quality of Work/Customer Complaints**

Including but not limited to: installation not complete to scope, unsafe or potentially hazardous installation, non-functioning equipment, failure to honor installation warranty unresponsiveness to customer inquiries, unresolved customer complaints.

#### **5. Disregard Program Guidelines**

Including but not limited to: purchase and/or installation of measure(s) prior to receiving Notice to Proceed (NTP), failure to disclose "Supplemental Installation Trade Professional" (sub-contractor) on program application, sending work invoices to customer or SDG&E prior to completion, submitting rebate applications prior to the installation of measures and/past participation verification.

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### VIOLATIONS OF THE TRADE PROFESSIONAL AGREEMENT OR CODE OF CONDUCT

SDG&E will maintain a log of customer complaints, issues, and other examples of non-compliance by Trade Professionals. SDG&E, in its sole discretion, may suspend or revoke Trade Professional's participation in any SDG&E program for violation of the program guidelines, program requirements and/or Alliance guidelines.

The termination shall be for a 1 year period (from the date of notification) unless otherwise specified. In extreme or egregious cases, SDG&E reserves the right to permanently terminate the Trade Professional from Alliance participation and revoke Trade Professional's qualification to participate in applicable SDG&E programs. Additionally, all affected customers will be notified should an application be received from a suspended/terminated Trade Professional.

SDG&E has no obligation to maintain, expand or continue the Trade Professional Alliance, and may terminate the Alliance at any time.

**By signing below, I, as a duly authorized representative of Trade Professional, agree that I have read, understand and shall fully comply with the terms of this Agreement and all applicable SDG&E Energy Efficiency program participation guidelines.**

Signature:		Date:		Title:	
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### 2019 TIERED PARTICIPATION

The Trade Professional Alliance has implemented a tiered participation for the 2019 program cycle and beyond.

**Licensed** - Trade Professionals who hold an active license with the California Contractors State License Board (CSLB) may:

- Promote SDG&E Energy Efficiency Programs in accordance with program guidelines
- Submit projects on behalf of customers
- Receive project updates
- Receive payment on Rebate, Incentive and On-Bill Financing (OBF) projects **when authorized in writing by duly authorized representative of the customer**

**Unlicensed** - Trade Professionals who do not hold an active license with the California Contractors State License Board **cannot receive payment** on Rebate Incentive and On-Bill Financing (OBF) projects. However, you may:

- Promote SDG&E Energy Efficiency Programs in accordance with program guidelines
- Submit projects on behalf of customers
- Receive projects updates

I am: ☐ Licensed (Fill out license info below) ☐ Unlicensed

CSLB License #:		Classification:		Expiration Date:	
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**NOTE: Trade Professionals are responsible for verifying licenses and safety for all subcontractors and installers working on related to SDG&E's Energy Efficiency Programs.**

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### TRADE ALLY COMPANY INFORMATION

Trade professional company name:		Date:		Title:	
Street address:		City:		State:	Zip:
Mailing address:		City:		State:	Zip:

### PAYEE NAME (if different than mailing address)

Payee company name:		Date:		Title:	
Street address:		City:		State:	Zip:
Mailing address:		City:		State:	Zip:

### BUSINESS TYPE & LICENSING

Contractor type: ☐ Installer ☐ Manufacturer ☐ Supplier

### TRADE ALLY TAX INFORMATION

Federal Tax ID #:		SSN #	
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Filing status: ☐ Corporation ☐ Exempt ☐ Individual/sole proprietor ☐ LLC ☐ Partnership

### TECHNOLOGY TYPE:

- ☐ Automated Demand Response ☐ Compressed Air ☐ Controls ☐ Demand response  
☐ HVAC ☐ Lighting ☐ Motors ☐ Natural gas ☐ Pumps ☐ Refrigeration  
☐ Other (Please specify other): \_\_\_\_\_

#### NOTE:

Trade Professional must hold an active license from the Contractor's State Licensing Board (CSLB) for each Technology Type selected, unless a CSLB license is not required to perform such work.

In accordance with California Public Utilities Code section 399.4(b)(2), if a permit is required for installation, Trade Professionals/customers must certify that the work complies with all applicable permitting requirements and that the contractor who performed the work holds appropriate license for the work performed. In addition, the Trade Professional/customer will be required to submit proof of permit closure for all HVAC related energy efficiency projects before receiving an SDG&E rebate or incentive payment.

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### EMPLOYEE CONTACT INFORMATION

#### Primary contact

Contact name:		Title:	
Phone number:		Email address:	

#### Administration support

Contact name:		Title:	
Phone number:		Email address:	
Contact name:		Title:	
Phone number:		Email address:	
Contact name:		Title:	
Phone number:		Email address:	

#### Sales and field representatives

Contact name:		Title:	
Phone number:		Email address:	
Contact name:		Title:	
Phone number:		Email address:	
Contact name:		Title:	
Phone number:		Email address:	

Return to: [Businessenergysavings@sdge.com](mailto:Businessenergysavings@sdge.com)

OR

San Diego Gas & Electric®  
Customer Programs  
8335 Century Park Ct., CP12D  
San Diego, CA 92123

# 2019 Trade Professional

## DIRECTORY QUESTIONNAIRE

SDG&E relies on Trade Professionals to help increase awareness of energy efficiency initiatives available for our customers, including rebates, incentives and financing to save energy and reduce costs. As an added benefit to your Alliance participation, your company will be included on SDG&E's Trade Professional Directory.

If you sell, install, or service energy efficient products and/or equipment and you would like to be listed, please complete this form so we can include your company on the Directory.

**1. Provide your company name as listed on your Trade Professional Agreement:**

**2. General/primary business contact number:**

**3. Primary business contact name to be displayed: (optional)**

**4. Contact email address: (optional)**

**5. Company web address:**

**6. Are you licensed with California's Contractors State License Board (CSLB)? If so, please provide your active license number:**

**7. Please indicate the technology(ies) you are engaged in. (Select all applicable items)**

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Agricultural   | <input type="checkbox"/> Automated demand response | <input type="checkbox"/> Compressed air           |
| <input type="checkbox"/> Controls       | <input type="checkbox"/> Demand response           | <input type="checkbox"/> Energy management system |
| <input type="checkbox"/> Energy storage | <input type="checkbox"/> HVAC                      | <input type="checkbox"/> Lighting                 |
| <input type="checkbox"/> Motors         | <input type="checkbox"/> Natural gas               | <input type="checkbox"/> Pumps                    |
| <input type="checkbox"/> Refrigeration  | <input type="checkbox"/> Renewable energy          |   |

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## DIRECTORY QUESTIONNAIRE



### 8. Please indicate the customer sector you target:

- |                                       |                                     |                                     |
|---------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Agricultural | <input type="checkbox"/> Commercial | <input type="checkbox"/> Industrial |
| <input type="checkbox"/> Government   | <input type="checkbox"/> All        |                                     |

### 9. Please indicate which region of SDG&E's service territory you serve.

- |  |                                       |   |
|--|---------------------------------------|---|
| <input type="checkbox"/> Orange County | <input type="checkbox"/> North County | <input type="checkbox"/> Central County |
| <input type="checkbox"/> South County  | <input type="checkbox"/> East County  | <input type="checkbox"/> All            |

### 10. Please indicate the services your company offers. (Select all applicable items)

- |   |   |                                      |
|---|---|--------------------------------------|
| <input type="checkbox"/> Audits               | <input type="checkbox"/> Consulting             | <input type="checkbox"/> Design      |
| <input type="checkbox"/> Engineering services | <input type="checkbox"/> Energy saving analysis | <input type="checkbox"/> Financing   |
| <input type="checkbox"/> General contractor   | <input type="checkbox"/> Installation           | <input type="checkbox"/> Maintenance |

Thank you for your interest and participation in SDG&E's Energy Efficiency programs and Trade Professional Alliance.

To verify Alliance participation status, customers may contact the Energy Savings Center at **800-644-6133** or [Businessenergysavings@sdge.com](mailto:Businessenergysavings@sdge.com).