



2009 Commercial Foodservice Equipment Vendor Participation Guidelines

Vendor Participation Guidelines Overview

The 2009 Commercial Foodservice Equipment (CFSE) program is a rebate program sponsored by Southern California Gas Company (SoCalGas®) under the direction of the California Public Utilities Commission (CPUC). The program began on January 1, 2009 and will end on December 31, 2009. This program may be modified or terminated without prior notice.

For purposes of the 2009 CFSE program, a vendor is defined as any third party payee listed on the rebate form. 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 vendors 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 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 most current rebate form for more information.

Guidelines for Vendor Activities

Vendors must sign and return the Vendor Participation Agreement (found on socalgas.com) prior to soliciting customer participation. A copy of this form must be on file with SoCalGas. Rebate payments will not be released to a vendor unless a signed Vendor Participation Agreement is on file. Vendors must properly install product at a SoCalGas account listed on the rebate form. Vendors must not misrepresent the nature of their role or their relationship with SoCalGas in connection with the 2009 CFSE program. 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 SoCalGas. No vendor participating in these programs may represent or otherwise indicate that the vendor's products and/or services are approved, authorized or endorsed by

SoCalGas. SoCalGas does not endorse any particular products, services or companies. Vendors may use the 2009 CFSE program name in promotional materials, advertisements or on the invoice. Vendors may not use the name or logo of SoCalGas in any promotional literature, advertisements or writing of any kind without the express prior written approval of SoCalGas. Vendors may advise a customer of the customer's option to have SoCalGas 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 (i.e., the customer must sign the invoice and initial the price reduction). In addition, the customer must complete and sign a Payment Release Form, which must accompany the rebate form. SoCalGas reserves the right to limit a vendor's participation in the 2009 CFSE program if, in SoCalGas' sole judgment, the vendor fails to comply with the program's guidelines and requirements.

Rebate Program Guidelines

The 2009 CFSE program has a limited budget. Reservations are strongly recommended to ensure fund availability; however, a reservation does not guarantee a rebate. Vendors must ensure that all terms and conditions and program requirements are met. Rebate forms without reservations will be accepted on a first-come, first-served basis until program deadlines are reached or until allocated funds for each program are spent. All rebate forms must be postmarked on or before December 31, 2009. Vendors cannot apply to other public goods charge rebate or incentive programs for the same measure. Equipment must be installed and operational prior to rebate form being submitted. Vendor must provide customer with applicable equipment warranty information for all measures installed. All projects submitted for a rebate may be inspected for the sole purpose of verifying that the equipment is installed and operating before processing a rebate form for payment. Typically, re-inspections are not performed. If a vendor disputes inspection results,

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SoCalGas may, at its discretion, perform an additional inspection. If an inspection does not pass due to failure to follow terms and conditions and program rules, SoCalGas 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. A signed copy of this agreement must be on file at SoCalGas 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. SoCalGas 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 the programs. Please see the appropriate rebate form and the Policies and Procedures Customer Handbook for additional program requirements and a list of eligible measures.

SoCalGas Program Overview

Contact SoCalGas' Energy Information Center of at **1-800-508-2348** before purchasing and installing equipment to confirm program eligibility and to reserve funds for your retrofit project.

Commercial Foodservice Equipment Program Eligibility

- Customers eligible for the 2009 CFSE program are defined as non-delinquent core and non-core commercial, industrial, and agricultural accounts.
- The total rebate limit for the 2009 CFSE program is \$25,000 per customer, per program year.

Application Process

Verify the measure(s) being applied for by consulting the terms and conditions located in the rebate form. 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. For every measure applied for, a matching line item must appear on the invoice, including labor for items such as pipe insulation installation. Under no circumstances will SoCalGas pay more than 100% of the purchase price of the items to be rebated.

1. Submit the appropriate completed rebate application. Include a detailed itemized invoice on contractor/vendor letterhead marked "*paid in full*" with:
 - ✓ *Description of installed measure(s)*
 - ✓ *Make and model number of installed measure(s)*
 - ✓ *Quantity*
 - ✓ *Unit Cost*
 - ✓ *Location or project site of installed measure(s)*
 - ✓ *Total Job Cost including applicable tax*
 - ✓ *Applicable tax shown as a line item*
 - ✓ *Less Rebate Amount (if applicable)*
 - ✓ *Total Due from Customer*
 - ✓ *Vendor contact name and phone number*
 - ✓ *Install Date*
2. Include the manufacturers' specification sheet; make sure the spec sheet qualifies the measure as detailed in the terms and conditions in the rebate form.
3. Ensure the rebate application is signed and dated by the customer.
4. Include a completed and signed customer Payment Release form if applicable. Make a copy of all submitted forms for your records.
5. A rebate check for qualified measures is mailed after SoCalGas receives and approves a completed application including all required documentation, and verifies installation. Incomplete or incorrect applications cannot be processed. You will be notified via mail of incorrect or incomplete applications.