

Partner Participation Agreement

February 1, 2012



PROGRAM OVERVIEW

The PSE EnergySmart Grocer Program provides audits, technical assistance, and financial incentives to grocers in the Puget Sound Energy service area who wish to purchase and install energy efficient lighting, HVAC, and refrigeration systems. This retrofit program is funded by Puget Sound Energy.

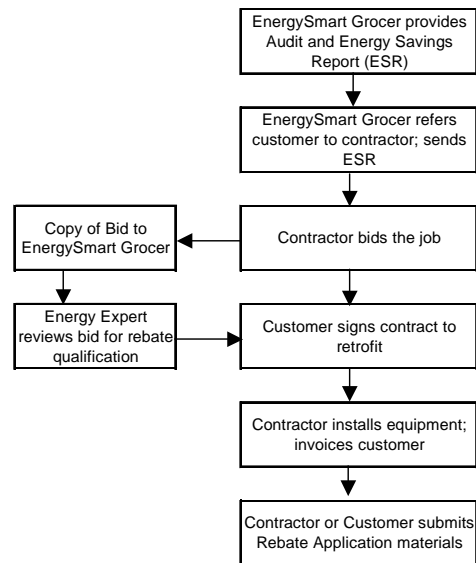
The program features on-the-ground, skilled Energy Experts who work directly with grocery store decision makers. The Energy Experts perform audits to identify energy-saving retrofit opportunities. With customer approval, the retrofit opportunities are referred to contractors. The contractor presents the customer with a bid, and if the bid is approved, implements the retrofit. Rebates go to the customer or directly to the contractor, if the customer chooses to release payment.

WHY PARTICIPATE

Grocers have enthusiastically embraced the opportunity to participate in this targeted program. The Energy Expert acts as a consultant to the store decision-maker by providing objective expertise and by facilitating the follow-through on the audits. This role expedites the decision-making process and drives high grocer participation.

THE PROCESS

The Energy Expert initiates contact with the grocer. The Energy Expert performs the audit and delivers the results in an Energy Savings Report to the store owner or operations manager. If the customer wishes to continue the process, they give the Energy Expert permission to provide a copy of the retrofit recommendations to select contractors. The contractor provides a bid for measures that the customer wishes to install, to both the Energy Expert and the customer. When the Energy Expert verifies that the bid meets the rebate criteria and the customer agrees to the purchase, the retrofit moves forward. In some cases, contractors bring customers to the program as well.



GUIDELINES FOR CONTRACTOR ACTIVITIES

Contractors are responsible for selling their services and for coordinating with Energy Experts to ensure that their work conforms to the terms and conditions of the program. The EnergySmart Grocer program reserves the right to bill back rebate dollars for the installation of measure(s) that do not meet program terms and conditions and/or measure(s) that were installed improperly. Contractors shall not misrepresent the nature of their role in the EnergySmart Grocer program. Specifically, **contractors shall not say that they are employed or working on the behalf the program.** All license requirements are solely the responsibility of the contractor. Contractors may not represent to customers that the EnergySmart Grocer program or Puget Sound Energy endorses their products.

PROGRAM PARTICIPATION

Participation in the program is straightforward. Contractors must submit a signed *Partner Participation Agreement*. The program will check to ensure that the business is a legitimate enterprise. In addition, contractors must receive a program orientation. As retrofit opportunities arise, the Energy Experts will provide referrals.

Participants receive:

- Referrals from Energy Experts
- High program visibility to grocers
- Direct payments, if the customer chooses to release rebate
- Quarterly updates on program status

Participants provide:

- Signed Partner Participation Agreement
- Copies of bids
- Complete invoice

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PARTICIPATION ENROLLMENT PROCESS

Contractors can enroll by submitting the *Partner Participation Agreement* in one of three ways:

- Submit directly to their Energy Expert
- Fax to 503-961-1343, or
- Mail to:
PSE EnergySmart Grocer Program
100 SW Main St, Ste 1600
Portland, OR 97204

REBATE APPLICATION PROCESS

The contractor is responsible for making sure that retrofitted equipment meets the EnergySmart Grocer program terms and conditions outlined in the Rebate Application. The rebate is the property of the retailer, but the retailer may release payment to the contractor. To receive the rebate check directly, contractors must fill out the *Payment Release Form*, obtain the customer's signature, and submit it with the itemized invoice and rebate application. **The invoice should clearly note that the rebate has been deducted from the sales price.** The EnergySmart Grocer program will then conduct a post installation verification. The post installation verification will verify that it meets terms and conditions and is satisfactorily installed. The program guarantees rebate payment within fifteen (15) working days of completing the post installation verification.

Rebates are issued on a first come, first served basis. The program reserves the right to reject rebate applications if they are incomplete. To ensure timely payment of the rebates, follow the steps below. Questions? Call 800-230-9420.

- Sign and return the attached *Partner Participation Agreement*.
- Receive program orientation.
- Install the qualifying equipment.
- Submit the appropriate completed Rebate Application, signed by the customer.
- Include customer signed *Payment Release Form*. (If customer releases payment)
- Include invoices or receipts that show:
 - Your name and address
 - Customer name and address where retrofit was installed
 - Itemized list of equipment that includes:
 - Make and model
 - Unit price
 - Quantity installed

Contractors who wish to participate as a PSE EnergySmart Grocer Partner must complete this form. A copy of this form must be on file in order to receive rebate payments.

By signing this agreement, I agree to provide my customers with information and documentation that is true and accurate to the best of my knowledge. I agree that any confidential information gained through this program regarding my customer will be used for the sole purpose of facilitating the customer's participation in the EnergySmart Grocer Program. Further, I understand that I am responsible for making sure everyone working for me understands the Terms and Conditions of the EnergySmart Grocer Program prior to soliciting customer participation.

Contractor Type: Lighting HVAC Refrigeration Other

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Customer Name *(printed)*

Mailing Address

City:

State:

Zip:

Phone:

Fax:

Email:

Contractor License Number:

Place of Business Registration

9 Digit Taxpayer ID Number:

Tax Status Individual/Sole Proprietor Corporation
 Partnership Other

Program incentives are taxable to the entity that receives the rebate check, whether it is the customer or the vendor. Rebates greater than \$600 (including cumulative) will be reported to the IRS unless proof of tax exempt status is provided.

Fax the completed form to EnergySmart Grocer at 503-961-1343 or give a copy to your Energy Expert.

I would like to receive regular updates on the EnergySmart Grocer Program via email.

Customer Signature

Signature Required →

Date

Customer Name *(printed)*

Title: