

# Contractor Co-op Guidelines

## OVERVIEW

As an Energy Upgrade California® Home Upgrade Participating Contractor, you provide energy saving products and services to property owners and play a vital role in marketing and recruiting participants. To encourage and facilitate partnerships, The Energy Network's Contractor Co-op offers a means for contractors to gain access to funding for education, equipment and marketing efforts that comply with these Guidelines and the Graphic Standards Guide.

In 2015-2016, the Co-op program will be expanded to include matching funds for **active** Participating Contractors for Home Upgrade and Advanced Home Upgrade marketing and other business related support services. For more information on the terms and conditions, please see the Co-op Participation Agreement.

**Funding for Co-op is available on a first-come, first-served basis or until December 31, 2016.**

**We highly recommend expending your funds before the date shown above.** Each Participating Contractor is eligible for up to \$20,000 in 2015-2016. Eligible projects include:

- (1) Marketing (must include the Home Upgrade logo)
- (2) Equipment Purchase
- (3) Equipment Calibration
- (4) Trainings and Certifications

When we combine our marketing efforts and resources, we reach a broader audience in our local communities. Increased promotion means increased homeowner awareness—and more business for contractors!

## ELIGIBILITY REQUIREMENTS AND FUNDING INFORMATION

Participating Contractors are eligible for Co-op if they (1) have been approved as a Home Upgrade Participating Contractor in Southern California Edison and Southern California Gas Company service territories -or- are a Participating Contractor with The Energy Network, and (2) maintain an active Participating Contractor status upon submittal of project requests for Matching Funds.

### **50% Matching Funds (up to \$20,000 in 2015-2016)**

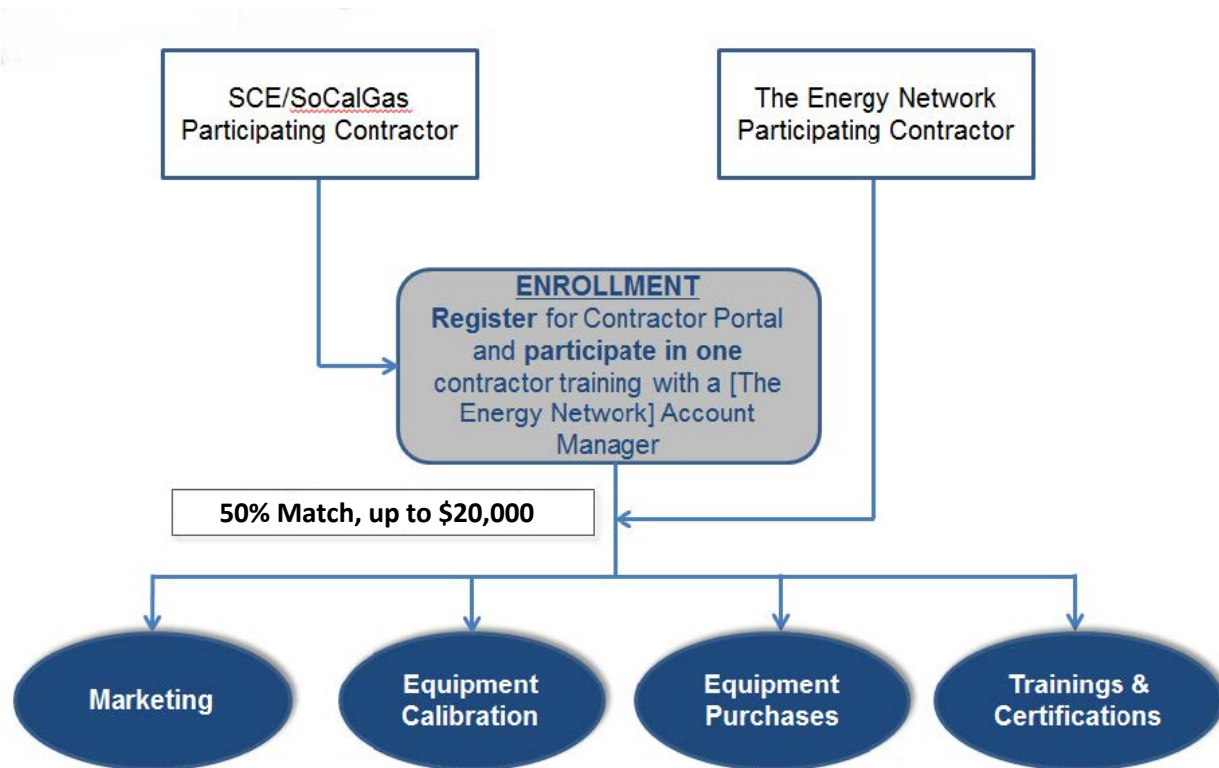
Matching Funds can be used when you incorporate Home Upgrade into your business efforts. By completing the Contractor Co-op reimbursement process, you can be reimbursed for 50% of the cost of certain expenses, up to \$20,000. For example:

- If you spend a total of \$50,000 on eligible marketing projects, we will reimburse you the maximum of \$20,000.
- If you spend \$4,000 on a project, we will reimburse you \$2,000.

To be eligible for Co-op Matching Funds, Participating Contractors are **required to submit their project for pre-approval.**



## ELIGIBLE PROJECTS



### (1) Marketing

Eligible marketing projects must include the Home Upgrade logo. Innovation is encouraged, as well as conventional marketing methods such as brochures and lawn signs. Other examples of costs eligible for Matching Funds include (but are not limited to) vehicle wraps, print and radio ads, postcards, apparel, signage, billboards, canvassing fees, trade show fees, exhibit booth materials, and revisions to a Participating Contractor website to include Home Upgrade logo and promotion. If you develop advertising, production costs can be paid with Matching Funds with proof of a media buy. We maintain a database of all projects and designs submitted to The Energy Network for each Participating Contractor.

**All Participating Contractors will be required to sign the Energy Upgrade California® Home Upgrade Brand Sublicense Agreement (BSA) for use of the Home Upgrade Brand. The BSA will be provided to Participating Contractors once a Participation Agreement is submitted.**

### (2) Equipment Purchase

*See List of Approved Home Upgrade Equipment Purchases*

All equipment purchase requests must be submitted through The Energy Network Contractor Portal. Once the request is pre-approved, equipment may be purchased. To receive Matching Funds, submit a final, paid receipt or invoice through the Contractor Portal.

Need to purchase something not on the list? Contact [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com) or (877) 785-2237.

### (3) Equipment Calibration

See *List of Approved Home Upgrade Equipment Purchases*. This list covers eligible equipment for calibration as well.

All equipment calibration requests must be submitted through The Energy Network Contractor Portal. Once the request is pre-approved, equipment may be calibrated. To receive Matching Funds, submit the final, paid receipt or invoice through the Contractor Portal.

Need to calibrate something not on the list? Contact [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com) or (877) 785-2237.

### (4) Trainings and Certifications

See *List of Approved Trainings and Certifications*.

All training and certification requests must be submitted through The Energy Network Contractor Portal. Once the request is pre-approved, you may pay for and complete the training or certification. To receive Matching Funds, submit final receipt or invoice through the Contractor Portal.

Would you like to participate in training not on the list? Contact [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com) or (877) 785-2237.

## ADDITIONAL GUIDELINES

- 1) The contractor must pay all costs incurred. The 50% Matching Funds are a *reimbursement*. Home Upgrade and The Energy Network do not pay vendors directly.
- 2) There is no completed Home Upgrade project requirement for the approval of a contractor's Matching Funds. Co-op funds are provided in order to support the contractor's Home Upgrade efforts.
- 3) Submissions that appear to be altered, unclear, or illegitimate in any way will be denied.

**Contractor Co-op funds are available on a first-come, first-served basis while funds are available.**

## Marketing Guidelines

All marketing requests must be pre-approved. Please submit requests through the Contractor Portal at <http://tenres.com/contractorportal>.

When using the Home Upgrade registered trademark in advertising, it must **always** comply with the Graphic Standards Guide. The list below summarizes the key requirements, with additional information found in the Graphic Standards Guide.

- 1) **Required logo** – The logos are available in several variations and can be found on The Energy Network’s website. If you have any questions about the logo, email [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com). Please review the Graphic Standards Guide for correct logo use.

### Stacked Options



### Horizontal Options





- 2) **Whole-house energy efficiency language** – the project must contain messaging promoting whole house energy efficiency, such as the following examples:
- a. “Lower energy. Less money. Big impact. Energy Upgrade California® Home Upgrade rebates and incentives can help you save money on your utility bills.”
  - b. “We can help make your home and environment better and more comfortable through energy efficiency.”
  - c. “Get rebates and incentives with the Energy Upgrade California® Home Upgrade.” NOTE: Rebate amounts should reflect what is currently and locally available.
  - d. “Ask us about Home Upgrade.”

Be aware of the utility incentives being offered to homeowners who will view your marketing materials.

- 3) **Additional language and messaging requirements** – please consider the following:
- a. Use “**Energy Upgrade California® Home Upgrade**” or “**Home Upgrade**” when referring to the offering. Do not use the abbreviations in public documents.
  - b. Use “**rebates and incentives.**” Homeowners are more familiar with the term “rebates,” but Home Upgrade is technically an incentive. You may use both terms together, but not “rebates” alone.
  - c. If advertising and promotion refers to rebate and incentive amounts, it must include the words “up to.” Example: “Get up to \$3,000 in rebates and incentives” or “Get up to \$3,000 back for home energy upgrades.”
  - d. Use “Energy Upgrade California® Home Upgrade Participating Contractor.” Capitalize each word to denote this as an official title.
  - e. ***Contractors may not use utility logos on marketing materials without approval from the utility marketing departments. The Energy Network will not serve as a channel for utility logo approval. Any projects with a non-authorized utility logo will not be approved.***
  - f. When associating your business with Home Upgrade, do not use the terms “authorized,” “endorsed,” “certified,” “qualified” or “partnering” or other forms of these words.
  - g. Promoting the Energy Upgrade California website or call center number is not required, but these resources are available for your customers to learn more about Home Upgrade.

For more information, please see the Graphic Standards Guide PDF.

**Failure to meet these guidelines could result in reimbursement denial. All designs must be pre-approved. A Participating Contractor who does not obtain design approval and submits for reimbursement retroactively, runs the risk of having their request for Matching Funds denied.**



## List of Approved Home Upgrade Equipment Purchases

All Equipment Purchase and Calibration Requests must be pre-approved. Please submit requests through the Contractor Portal at <http://tenres.com/contractorportal>.

Need to purchase something not on the list? Contact [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com) or call (877)785-2237.

### Home Upgrade Testing Equipment

- blower door
- Duct Blaster or other duct test equipment
- flow hood
- digital pressure and flow gauge (manometer) and tubing
- electronic gas leak detector
- micro-leak gas leak solution
- carbon monoxide detector
- telescoping ladder
- Wizard Stick smoke creator or small mirror for spillage testing
- duct grille and register blocking materials
- thermometer
- watt-hour meter
- charging pump
- vacuum pump
- hose
- personal safety equipment: hard hat and respirator

### Software

- Accredited energy modeling software for Advanced Home Upgrade



## List of Approved Trainings and Certifications

All requests must be pre-approved. Please submit requests through the Contractor Portal at <http://tenres.com/contractorportal>.

Would you like to participate in a training or certification not on this list? Please contact [coop@theenergynetwork.com](mailto:coop@theenergynetwork.com) or call **(877)785-2237** for additional information.

### BPI

- Re-certification support
- Continuing Education Units (CEUS)

### Other

- CalCERTS HERS Training: <https://www.calcerts.com/Training.cfm>
  - Whole House (HERS II) and Building Performance Contractor Certifications.
- GreenPoint Rated Existing Home Single Family
- LEED for Homes
- NATE HVAC Certification
- ACCA has certification for Manuals J, D, S
- Trainings and certificates offered by accredited institutions