Statewide Plug-Load & Appliance Implementation Plan

July 2022

PREPARED BY CLEAResult®
PREPARED FOR San Diego Gas & Electric

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Program Overview

The Statewide Plug-Load & Appliance Program (Program) is a midstream program that will offer energy efficiency measures including high-efficiency smart thermostats, heat pump water heaters, gas water heaters and room air conditioners. The Program captures savings through the movement of incentivized deemed measures at participating retailer and distributor locations.

The current implementation agreement term is three (3) years with annual review processes and ongoing performance evaluation. The Program budget is $47,878,624. The Program's total Net savings goals are 59,218,493 kWh, 9,642 kW, and 925,327 therms. The Program will be offered consistently across Investor-Owned Utility (IOU) territories and made available to all retailers and distributors in all IOU territories that meet program requirements. San Diego Gas & Electric (SDG&E) has been named the lead IOU responsible for the administration of the Program and CLEAResult Consulting is the third-party implementer.

Program Budget & Savings

1. **Program Name:**

   Statewide Plug-Load & Appliance (PLA) Program

   Common program name is California Instant Rebate Program. Note: the customer-facing program name is currently in development.

2. **Program ID number:**

   SW_PLA

3. **Program Budget Table:**

	Program Budget					
Cost Category Description	Startup	2022	2023	2024	Total	Percent of Total
Administration & Overhead	$120,597	$502,659	$617,678	$650,618	$1,891,554	4%
Marketing, Outreach	$404,020	$1,495,301	$1,540,362	$1,540,362	$4,980,045	10%
Direct Implementation – Non–Incentive	$563,732	$4,198,068	$4,780,609	$5,592,277	$15,134,686	32%
Direct Implementation – Incentive	$0	$6,741,304	$8,676,685	$10,454,350	$25,872,339	52%
Total Implementation Budget	**$1,088,349**	**$12,937,333**	**$15,615,335**	**$18,237,607**	**$47,878,624**	**100%**

4. **Program Net Impacts Table:**

	Program Year			
CA Instant Rebate Program Goals	2022	2023	2024	Total
Net Energy Savings (kWh)	14,698,223	19,862,442	24,657,828	**59,218,493**
Net Energy Savings (Therms)	301,774	303,613	319,940	**925,327**
Net Demand Reduction (kW)	2,458	3,269	3,915	**9,642**

5. **Total Resource Cost Test (TRC) Goals:**

	Program Year TRC Ratio Goals		
CA Instant Rebate Program Goals	2022	2023	2024
TRC	1.05	1.28	0.86

6. **Program Administrator Cost Test (PAC) Goals:**

	Program Year PAC Ratio Goals		
CA Instant Rebate Program Goals	2022	2023	2024
PAC	1.38	1.72	1.15

7. **Type of Program:**

   Third-party delivered

8. **Market Sector(s):**

   Residential, all segments

9. **Program Type:**

   Resource

10. **Market Channel(s) and Intervention Strategies:**

    The Program's market channels are midstream through partner retailers and distributors, and the intervention strategy is primarily incentive. Program Launch readiness began upon the Notice to Proceed issued May 24, 2022, with Program Launch expected in Q3 2022. Ongoing implementation will occur through the year 2024. Program goals are based on Net savings as indicated in the Program Net Impacts Table.

Implementation Plan Narrative

1. **Program Description:**

   The Program provides the expertise and infrastructure needed to maximize customer/supply chain participation and energy savings while supporting the data collection and product focus required for reliable energy savings and program cost-effectiveness. The Program will engage "Program Partners" – retailers and distributors – to offer incentives for energy-efficient equipment that will deliver energy savings for customers across Pacific Gas & Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E), Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas) service territories.

   The Program will engage participating retailers and distributors in providing an instant rebate customer experience through one of these channels:

   a. **Instant Rebate**: The Program will provide electronic instant customer validation that enables customers to purchase eligible products for a discounted price with program attribution through an online instant rebate coupon system, where coupons are redeemable at participating retailer locations. For these measures, the incentive amount is the same as the coupon value.

b. **Midstream Distributors**: Participating distributors will be able to electronically validate product and customer eligibility and report sales through the implementer's designated online portal to ensure qualifying sales are attributed to eligible customers. Incentives will be paid to the distributor per volume reported in the Program's online portal. The incentive amounts for these measures are included in the CET, and the participating distributor has the option to pass the incentive on to their customer. When the incentive is not passed down to the customer, the participating distributor will be required to comply with additional Program rules outlined in the Quality Assurance Plan.

2. **Program Delivery and Customer Services:**

The Program will deliver offerings by working with a network of participating retailers and distributors to deliver incentive-eligible equipment via the midstream channel to residential customers statewide. The Program's Partner recruitment approach will be delivered throughout the four (4) IOU service territories, and the implementer will work with its Program Partners to meet customer demand for qualifying high-efficiency products.

Key aspects of the Program's strategy include recruiting retailers and distributors that serve the areas of California with the greatest sales potential for high-efficiency PLA equipment, identified through CLEAResult's prior statewide implementation experience, available market data, and Geographic Information Systems (GIS) GIS analysis. The Program will provide in-store promotional materials to retailers and distributors that direct the customer to qualifying energy-efficient products. The Program will also train program management, account management, and field staff on how to effectively communicate the value of program participation and engage Program Partners and/or customers to participate and promote program offerings.

To engage with customers in CPUC-defined Disadvantaged Communities (DACs), the Program will use the latest version of the CalEnviroScreen Tool to identify DAC census tracts and recruit and support retailers and distributors that serve these communities.

The Program's marketing and outreach efforts will also aim to reach HTR communities and DACs through messaging to convey the benefits of high-efficiency equipment in culturally appropriate terms for diverse communities. The Program's strategy also entails coordinating with community-based organizations (CBOs) serving HTR customers and DACs to provide collateral or other communications on the benefits of energy-efficient equipment.

3. **Program Design and Best Practices:**

The Program's strategies/tactics advance the statewide PLA market by effectively mitigating persistent barriers to participation in more traditional rebate programs, such as a) higher upfront cost of high-efficiency measures decreases motivation among key market actors, including end-user customers, retailers and distributors; b) limited consumer awareness about high-efficiency product options and their benefits; and c) when there is a lack of availability of high-efficiency products consumers tend to choose the most readily available and familiar products, which are typically less efficient.

The implementer's approach utilizes proven technology to provide instant customer validation at the point of purchase for a discounted price with program attribution and data collection to meet policy requirements. To address the barrier of higher upfront cost of high-efficiency measures, the Program's Instant Rebate online, the mobile-friendly tool, makes it easier for consumers to unlock available discounts at the point of purchase without requiring customers to complete paperwork and wait for their incentive. Upfront validation via the Instant Rebate tool also increases participating retailers' and

distributors' confidence to pass the initial discount to customers without fearing disallowance or non-payment.

The Program's strategy to reduce barriers associated with consumers' limited awareness of high-efficiency product benefits (e.g., higher performance, longer lifespan, lower operating costs, positive impact on home comfort, etc.) entails deploying targeted marketing efforts to frame the attributes of program measures in terms that are directly relevant to high-potential customers across the IOU territories. Customer communication will be targeted by factors like climate zone, DAC or HTR communities to prioritize the highest potential customers and measure combinations. The Program's proactive engagement and training at each level of the supply chain will amplify these value propositions across the market, inspiring greater consumer interest.

In conjunction with the targeted marketing and communication noted above, the Program will work to shift consumers' tendency to choose the most readily available and familiar products (which are often less efficient), toward efficient PLA measures. Our holistic supply chain engagement approach will motivate improved stocking practices for qualifying PLA measures to help customers view the efficient option as an available and familiar one. For example, the Program will present our market partners with clear business cases by product category and channel, as well as the tools and information – including in-store collateral and ongoing training – they need to encourage customers to make the more efficient choice. In addition to generating awareness and engagement through the above channels, CLEAResult's strategic partnerships with manufacturers allow for early insight into promotional opportunities for increased incentive to make an EE decision when the price is competitive or comparable to less efficient products.

The Program will promote beneficial electrification through the advancement of heat pump water heater technologies. The Program is structured to increase adoption of this technology by customers, while also driving increases in availability by working with retailers and distributors to integrate them into their stocking practices.

4. Innovation:

The Program's innovative marketing and engagement approach includes working with SDG&E to identify outreach and communication opportunities to encourage customers to install DR-enabled measures and enroll in relevant DR programs in support of statewide IDSM and peak reduction efforts. In addition, the Program will work with SDG&E to identify cross-referral opportunities and ensure coordination with other relevant State and CPUC-sponsored programs and initiatives such as TECH and Comfortably California.

Using a variety of research sources, the Program will conduct a comprehensive target audience analysis to identify and prioritize California residential customers with propensities to adopt each measure resulting in a set of key customer personas. The personas will be fundamental to the Program Marketing Strategy, specifically, how, where, and when we reach customers (media), which measures we promote to whom and when we promote them (seasonality/climate), the content and type of our communications (tactics), and our engagement metrics and evaluation (optimization). This innovative, highly targeted approach will allow the Program to educate the customer not only on the value of EE measures, but also on the benefits of electrification and/or demand response for relevant measures. Whenever possible, we will lead our customer communications with broader messages aiming at educating and informing rather than focusing on transactional messaging.

In addition to the targeted approach to raising customer awareness of the Program, once a customer obtains a rebate coupon, Program marketing will further communicate with the customer to cross-promote other Program measures as well as other California DSM programs as appropriate. Communications will be based on customer preference, email, or SMS, as indicated by the customer. Continuous engagement workflows and business rules will be developed depending on the customer type, the product purchased, timing/seasonality, and customer opt-in.

5. Metrics:

The table below identifies the Key Performance Indicators (KPIs) for the Program and describes how each KPI will be tracked. These KPIs will be the primary means of assessing the Program's performance on an ongoing basis with tracking of some KPIs on a semi-monthly basis but the development of a KPI score (multiplier * score) on a quarterly basis.

Savings, Incentives and TRC metrics shall be derived from the quarterly CET. KPIs will be reviewed annually and updated based on changes to individual measure savings or CET inputs which will affect TRC.

In general, the KPI ratings will be based on a 0 – 4 scale:

0: Unsatisfactory
1: Below expectations
2: Meeting Expectations
3: Exceeding Expectations
4: Greatly exceeding expectations

ID	Weight	Category	Description	Scoring	Continuous Monitoring Mechanisms
1	20%	**Program Performance:** kWh Savings (net 1st Year lifecycle savings)	To date, % achieved of net 1st Year kWh savings required under the Agreement split on an even pro rata basis	0: less than 60% 1: 60 – 79% 2: 80 – 100% 3: 101 – 120% 4: greater than 120%	EECP
2	10%	**Program Performance:** kW Savings (net 1st Year lifecycle savings)	To date, % achieved of net 1st Year kW savings required under the Agreement split on an even pro rata basis	0: less than 60% 1: 60 – 79% 2: 80 – 100% 3: 101 – 120 % 4: greater than 120%	EECP
3	10%	**Program Performance:** Therm Savings (net 1st Year lifecycle savings)	To date, % achieved of net 1st Year Therm savings required under the Agreement split on an even pro rata basis	0: less than 60% 1: 60 – 79% 2: 80 – 100% 3: 101 – 120% 4: greater than 120%	EECP
4	10%	**Program Performance:** TRC Ratio	Program's TRC ratio based on measure installations and spend to date	0: less than 1.55 1: 1.56 – 1.64 2: 1.65 – 1.82 4: greater than 1.93	CET Tool
5	10%	**Compliance:** Reporting Accuracy	Average % variance between the forecasted figures and actual figures for the reporting period (energy savings, expenditures and accruals	0: greater than 39% 1: 30 – 39% 2: 20 – 29% 3: 10 – 19% 4: less than 10%	Quarterly Report
6	10%	**End Use Customer Education**	% Of direct-to-customer communications (e.g. transactional emails, marketing emails) that will include messaging to educate on and promote IDSM and/or fuel substitution (for DR-relevant / fuel substitution-relevant measures)	0: less than 50% 1: 50% - 74% 2: 75% - 85% 3: 85% - 94% 4: 95% -100%	Quarterly Report
7	5%	**Distributor, Retailer and Customer Satisfaction:** Survey Scoring	Average score of customer satisfaction surveys administered by Contractor (Assuming a 5point scale where 5 is highly satisfied)	0: less than 1.9 1: 2.0 – 2.9 2: 3.0 – 3.9 3: 4.0 – 4.8 4: greater than 4.8	Quarterly Report
8	10%	**Compliance:** HTR/DAC Outreach	% Implementer will enroll of those retail locations located in Program's identified DAC zip codes that have the capability to use the IR platform.	0: <10% 1: 10% <25%% 2: 25% <50% 3: 50% <70% 4: 70%-100%	Quarterly Report
9	5%	**Compliance:** Diverse Business Enterprise	To date, DBE spending as percent of total spend and DBE % commitment	0: less than 70% 1: 70 – 90% 2: 90 – 100% 3: 101 – 120% 4: greater than 120%	Quarterly Report
10	10%	**Program Performance:** Fuel Sub Heat Pump Water Heater Units	To date, number of fuel substitution heat pump water heater units achieved under the Agreement split on an even pro rata basis	0: less than 70% 1: 70-79%% 2: 80-90% 3: 90%-100% 4: 100%	EECP

6. **For Programs claiming to-code savings:**

   Not applicable.

7. **Pilots:**

   Not applicable.

8. **Workforce Standards:**

   Not applicable.

9. **Additional Information:**

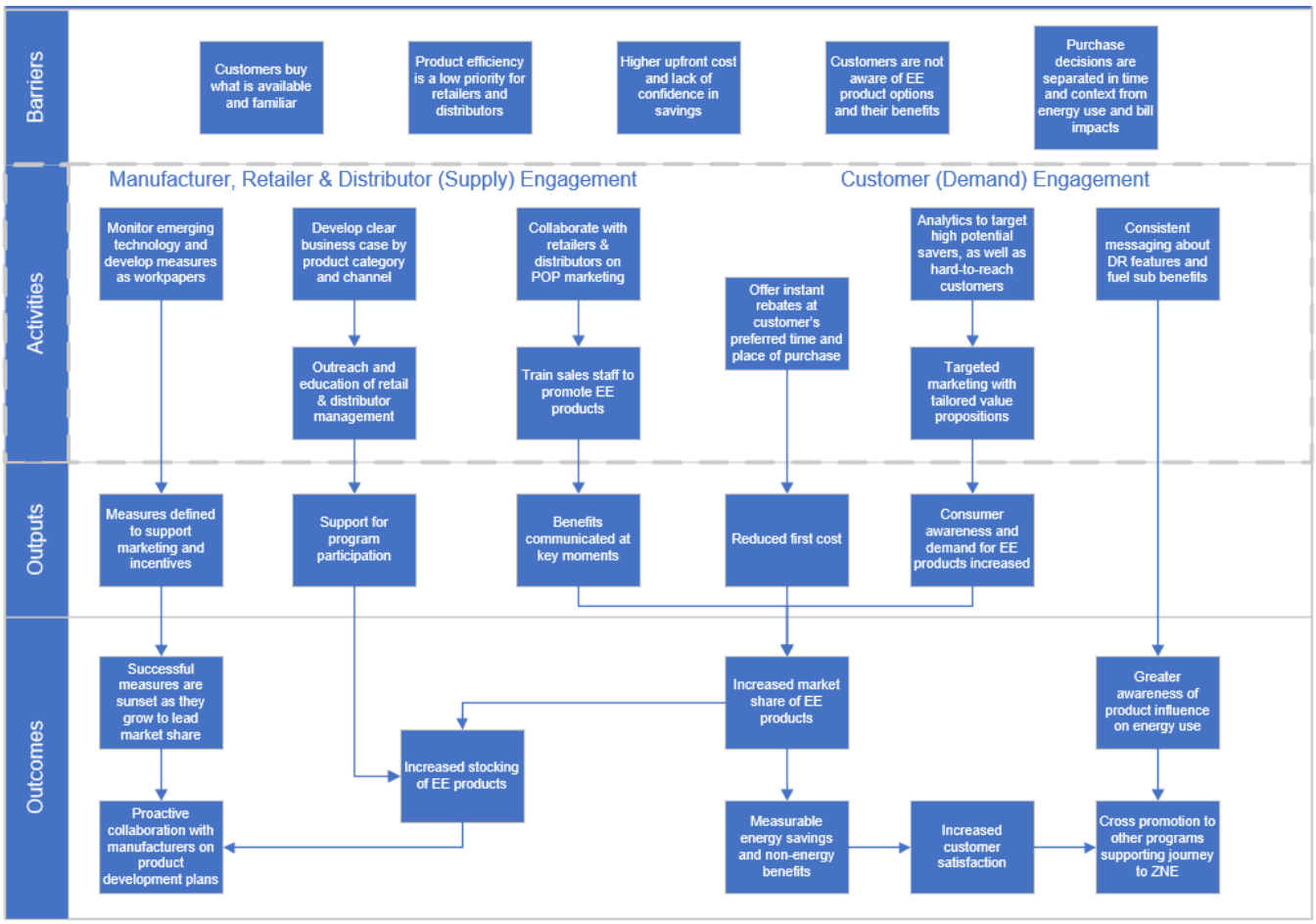
   Not Applicable.

Supporting Documents

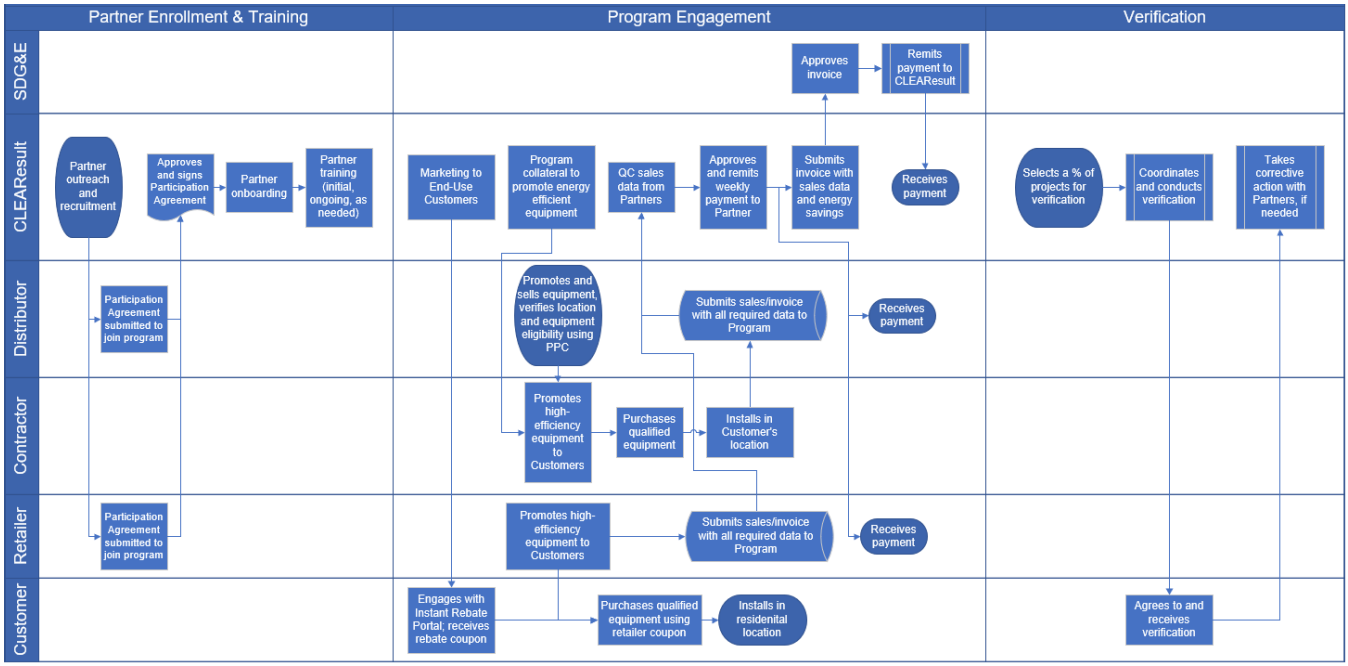
1. **Program Manuals & Program Rules:**

   See Program Manuals section below.

2. **Program Theory & Program Logic Model:**



3. Process Flow Chart:



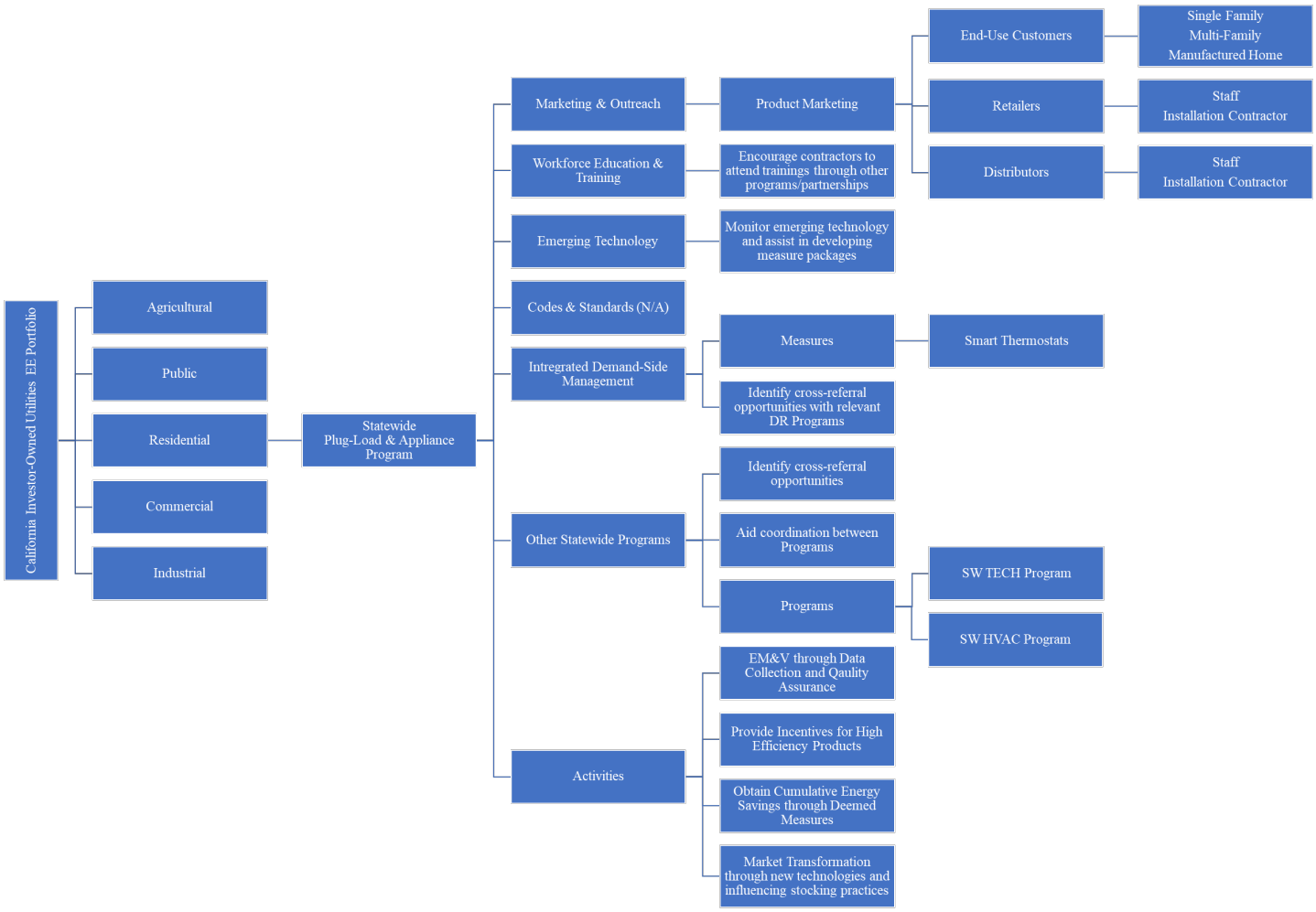
4. Incentive Tables, Measure Packages, Software Tools:

See Section 30 below

5. Quantitative Program Targets:

	Energy Savings Goals			
CA Instant Rebate Program Goals	2022	2023	2024	Total
Net Energy Savings (kWh)	14,698,223	19,862,442	24,657,828	**59,218,493**
Net Energy Savings (Therms)	301,774	303,613	319,940	**925,327**
Net Demand Reduction (kW)	2,458	3,269	3,915	**9,642**

6. Diagram of Program:



7. Evaluation, Measurement & Verification (EM&V):

The following plan outlines CLEAResult's strategy for calculating and reporting the ex-ante net energy and demand savings delivered by the California Instant Rebate Program (Program). Our approach is designed to establish clear attribution of savings through accurately measuring and documenting key points of influence on retailers, distributors, and end use customers to consider when moving high-efficiency equipment into the market. Our extensive retail and midstream delivery experience informs a Program design that reflects the market reality, backed by robust verification.

Data Collection

The Program will utilize deemed savings measure packages to determine savings. The existing measure packages have been carefully reviewed to determine their data collection requirements. In addition, we have considered additional data collection fields that may be useful in order to document program influence. The tables below summarize when and how in the program delivery the needed data will be collected.

Instant Rebate Coupon Data Collection Approach

Data Requirement	When Collected	How Collected
Customer name, location (address), contact details, and utility	Prior to purchase, continuously	Customer completes rebate request form
Date customer requests coupon	Prior to purchase, continuously	Platform-generated with request submittal
How customer learned about the program	Prior to purchase, continuously	Optionally submitted by customer on rebate request
Baseline equipment information	Prior to purchase, continuously	Customers may be required to supply information about their home or equipment
Measure equipment make, model, and efficiency	After purchase, monthly	Retailer/distributor sales reports
Date customer completes purchase	After purchase, monthly	Retailer/distributor sales reports
Purchase location, full retail price, and discounted price	After purchase, monthly	Retailer/distributor sales reports

Distributor / Markdown Data Collection Approach

Data Requirement	When Collected	How Collected
Customer information (according to requirements of Participation Agreement)	During or after purchase, (according to requirements of Participation Agreement)	Distributor sales reports
Date of purchase	After purchase, monthly	Distributor sales reports
Measure equipment make, model, and efficiency	After purchase, monthly	Distributor sales reports
Purchase location, full retail price, and discounted price	After purchase, monthly	Distributor sales reports

The following tables are not an exhaustive list, as measure packages remain the authoritative source of data requirements. CLEAResult will ensure that measure packages are aligned with our measure delivery and data collection approach. The supporting measure packages for proposed measures have been submitted via PowerAdvocate per RFP instructions. These measure packages, and any additional measure packages that CLEAResult develops to support the Program, will be maintained in accordance with the process described in CPUC Decision 15-10-028.

Savings Calculation

We will track data and perform savings calculations in real-time through our Program platform. Gross energy savings will be calculated as the product of the appropriate energy impact factor from the approved measure package values – selected using the collected customer and equipment data – and the volume of participating measures. We have designed the Program to specifically address market opportunities when moving high-efficiency equipment into the market. As such, baselines are generally taken to be current Title 20 equipment standards.

In situations where baseline changes are needed or uncertainty exists around possible savings adjustments, CLEAResult will develop risk mitigation strategies associated with Program delivery and savings attainment. Strategies we may deploy include:

1. Developing plans to update existing measure packages where we have proactively identified calculation and categorization inconsistencies that may lead to inaccurate savings estimates
2. Anticipating upcoming state and federal standards that may lead to baseline shifts, allowing time to plan for a gradual transition to higher efficiency product tiers
3. Developing a data collection plan for smart thermostat savings to address questions or uncertain results from impact evaluations
4. Contingency planning for slow market adoption of heat pump water heaters due to high incremental costs and low market awareness
5. Developing measure packages that respond to shifting market needs and cost-effectiveness requirements, with time-of-use savings and decarbonization becoming the greater focus

CLEAResult's dedicated resources can address these issues nimbly and effectively. Our Engineering Team and national Solutions Group have extensive experience in measure characterization, M&V protocols, and program design. They will design a reporting process to raise and manage critical issues and report ongoing data collection efforts at an agreed-upon interval.

Verification

CLEAResult will monitor the Program's effect on customer purchasing decisions to inform Program enhancements and better align our design with changing market needs. We typically focus on three main points of influence: 1) Availability of in-stock qualifying equipment, 2) Marketing and promotional activities, and 3) Incremental and total price of high-efficiency equipment. Our thoughtful design for the Program addresses each of those areas of influence. To provide the IOUs with clear evidence of the Program's impact on customer purchasing decisions, we will track relevant data points to accurately document program influence.

Using our Instant Rebate platform, analytics and reporting tools, CLEAResult can capture the customer's online journey from when they land on the rebate portal to selecting their desired product coupon, and ultimately the timing of their purchase (using their coupon). This data will offer invaluable insight into how our marketing, outreach and incentive design can be adjusted to move with market needs. Our access to retailer and distributor datasets, as well as trade group data sets, to develop inventory baselines for all categories of available equipment will help us determine where the market is moving compared to where the opportunity exists.

CLEAResult will also conduct regular outreach to participating store locations to assess their utilization of program training materials and marketing resources. We collect data from these visits using established field tools that flow back into the Program platform to provide a comprehensive view of the partner's participation. While this data is largely qualitative, it is useful in understanding the effectiveness of training and promotional activities.

All verification data can also be useful for the evaluator in designing and performing any relevant process evaluations.

Reporting

CLEAResult will store all sales data and impacts in our Program platform for streamlined reporting. Supporting measure packages and savings values will be made available to stakeholders via the DEER workpaper archive and/or the CalTF eTRM. We provide the following report to the Program Administrator.

Reports	Description	Frequency
Product Volume and Savings	Regular reporting with invoicing and KPIs	Monthly
CEDARS Data Report	All Program data necessary to support uploads to CEDARS	Quarterly
Forecast Volume and Savings	Updated forecast delivery volume and savings for the quarter ahead	Monthly
Annual Impact	Full report on annual impacts and comparison to forecast	Annually
Measure Package Plan	Comprehensive plan indicating what measure packages will be updated; process for updates	Annually
Measure packages	Final approved measure packages and supporting data	Annually
Customer Influence Summary	Summary of how the Program influences partners and customers using data collected in the field and using platform analytics	As requested

8. Normalized Metered Energy Consumption (NMEC):

Not applicable

Program Manuals

1. **Eligible Measures or measure eligibility, if applicable:**

Measure Name	Delivery Type	Savings Source (Measure Package)	Incentive Unit & Amount
Efficient room air conditioner, 10,000 btu, ENERGY STAR +10%	Midstream	SWAP007-1	$20
Residential smart thermostat Residential smart thermostat heat pump	Midstream	SWHC039-4	$35 $35
HP water heater: 45 to 55 gal (UEF = 3.09) replacing electric storage water heater 40 gal (UEF = 0.92) HP water heater: 45 to 55 gal (UEF = 3.31) replacing electric storage water heater 40 gal (UEF = 0.92) HP water heater: 45 to 55 gal (UEF = 3.09) replacing electric storage water heater 50 gal (UEF = 0.92) HP water heater: 45 to 55 gal (UEF = 3.31) replacing electric storage water heater 50 gal (UEF = 0.92)	Midstream	SWWH014-3	$325 $400 $325 $400
Efficient storage water heater: 40 gal (UEF = 0.64), med. draw Efficient storage water heater: 40 gal (UEF = 0.68), high draw Efficient storage water heater: 50 gal (UEF = 0.64), med. draw Efficient storage water heater: 50 gal (UEF = 0.68), high draw	Midstream	SWWH012-2	$75 $100 $75 $100
Heat pump water heater >45 to <=55 gal, UEF = 3.09 replacing storage natural gas water heater, 40 gal, UEF = 0.58 Heat pump water heater >45 to <=55 gal, UEF = 3.31 replacing storage natural gas water heater, 40 gal, UEF = 0.58	Midstream	SWWH025-4	$325 $400

2. **Eligibility Requirements:**

Customer Eligibility:

For customers to participate and benefit from the Program, they must be a residential customer of the four funding IOUs: SDG&E, PG&E, SCE or SoCal Gas. Customers may reside in a single-family, multi-family or manufactured home.

In order to ensure only qualified IOU customers participate, customers using the Program's Instant Rebate portal will be validated as an eligible IOU customer. Validation will occur instantly through the Program's rebate portal by checking the customer's name and installation address (and/or other data as required by that measure) against utility data (and/or other data as agreed upon with the Lead IOU, SDG&E). As described above, once a customer is validated, they receive a rebate coupon code that can be used immediately to purchase the eligible product.

Retailer Requirements:

In addition to satisfying all other requirements of the Program, for a Retailer to qualify and remain qualified as a Participating Partner, a Retailer must:

1. Purchase Program-qualified products directly from a manufacturer or wholesaler and sell such products to be installed at a qualifying Customer's residence.
2. Be approved to participate in the Program by the Program Implementer, CLEAResult.
3. Have a license to sell Program-qualified product in the State of California.

4. Provide an IRS W-9 and California 590.
5. Agree to display Program-approved or Program-provided promotional materials and/or Point of Purchase materials (POP) at POS locations in accordance with SDG&E policies and guidelines, or non-Lead IOUs as agreed upon between the implementer and the non-lead IOU. (As the Lead IOU, SDG&E will provide the necessary facilitation between implementer and other funding IOUs to ensure a streamlined process for approval of promotional materials).
6. Be able to collect and report all required Program data as directed in in the Program's Scope of Work - Attachment 2, and detailed in the Program Policy and Procedures and/or retailer Promotion Agreements.
7. For measures with validated Instant Rebate, a participating retailer will be able to confirm that the Instant Rebate coupon is only eligible for qualifying Products and may only be redeemed once, for installation in a qualified residential site located in the Program territory.
8. Be able to provide POS discounts for qualifying products using the Program's Instant Rebate coupon system.
9. Indicate the amount discounted on sales invoices/receipts and/or shelf pricing for qualifying products.
10. Commit to implement the POS discount for the entire Agreement Period. If the participating retailer becomes aware of issues or circumstances that may prevent the retailer from implementing the Program for all or part of the Program Period, then the retailer must notify implementer within the timeframe outlined on their Promotion Agreement.
11. Agree to not provide POS discounts for any product purchased at a participating distributor where the Program's incentive has already been provided.

Distributor Eligibility Requirements:

In addition to satisfying all other requirements of the Program, for a Distributor to qualify and remain qualified for the Program, a participating distributor must:

1. Purchase Products directly from the manufacturer and sell such Products to be installed at a qualifying Customer's facility or residence. If Distributor is also the manufacturer of the product, then the Manufacturer may qualify with the requirements of the Program.
2. Be approved to participate in the Program by the implementer.
3. Only submit sales from the preapproved list of ZIP codes supplied by SDG&E.
4. Have a license to sell product in the State of California.
5. Provide an IRS W-9 and California 590.
6. Agree to display Program-approved or Program-provided promotional materials at POS locations in accordance with SDG&E policies and guidelines, or non-Lead IOUs as agreed upon between the implementer and the non-lead IOU. (As the Lead IOU, SDG&E will provide the facilitation between Implementor and other IOUs necessary to ensure a streamlined process for approval of promotional materials).
7. Be able to collect and report all required Program data as directed in the Program's contract Scope of Work - Attachment 2, and detailed in the Program Policy and Procedures and/or distributor Promotion Agreements.
8. Confirm that qualifying products are sold at a participating location within the Program territory.
9. If POS discounts are provided to the distributor's customer, the distributor must include on all sales invoices for qualifying products a line item indicating the Program's incentive as the amount discounted.

10. Agree to participate in an initial survey during the onboarding phase and any subsequent surveys conducted by the Program indicating how incentive funds are utilized by distributors. This process is applicable when the total incentive is not passed down to the end use customer. A checklist of how the funds can and cannot be utilized will be provided in the Program Policy and Procedures and reflected in the Promotion Agreement. Additionally, for all incentive funding not passed down to the distributor's customer, the Distributor will be required to respond annually to surveys that provide information regarding appropriate use of funds. If funds are found to be misappropriated, then Distributor is liable to return misappropriated funds to the implementer, who will return the funds back to SDG&E.
11. With each eligible sale, the distributor will provide the customer/purchaser a copy of the Program Notification. The Program Notification is a written notification provided to all purchasers of a measure from a Distributor, which contains the Program terms and provisions. Distributors shall provide the Program Notification to the purchaser for them to provide to the customer at whose site the applicable Measure will be installed (if the purchaser is not the customer).
12. Commit to implement the POS discount for the entire Agreement Period. If Distributor becomes aware of issues or circumstances that may prevent them from implementing the Program for all or part of the Program Period, then the Distributor must notify the implementer within the timeframe outlined on their Promotion Agreement.

3. Contractor Eligibility Requirements:

Not applicable. Contractors and Sub-Contractors are not direct participants nor direct recipients of Program benefits; therefore, they are not subject to any Program eligibility requirements.

4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners:

This Midstream Program engages retailers and distributors to offer incentives for energy-efficient equipment. A list of participating retailers and distributors will be available on the PEPMA and/or Program website upon the Program's launch.

5. Additional Services:

Not Applicable

6. Audits:

Not applicable.

7. Program Quality Assurance Provisions:

Refer to Quality Assurance Plan.

Attached Supporting Documents:

- Quality Assurance Plan
- Marketing Plan