

# Advanced Energy Center

## Contractor Project Steps and FAQs

# Project Steps

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# Recap: Advanced Energy Center Opportunities

## Rebate-Only Projects

- Commercial and residential customers receive SCP and/or Vendor rebate on products featured at the Advanced Energy Center
- Receive requests for bids
- Contractor procures products at a discounted rate and is paid by the customer for labor and materials

## On-Bill Financing Projects

- Approved residential customers receive up to \$10,000, at 0% interest, for up to 10 years
- Contractor is paid by SCP for approved labor and materials
- Contractor receives pre-qualified requests for bids
- Projects can only be completed by participating On-Bill Financing contractors
- Become a financing Contractor by watching the [On-bill Financing Certification Course](#) then emailing [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org)



# Choose Technologies To Install

## How do I know what I'm eligible to install?

- Contractors select the product categories they are interested in via the Contractor Application
- Go to the Professionals Manual Appendix B for information on how to become certified for the technologies you wish to install. There are three ways to become certified:
  - Vendor training
  - SCP training
  - Join Vendor List
- Received a certification or watched a recorded training? Email [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org) with your certificate to receive requests for bids for that product



Eligible Technologies	Group
Mini-split heat pumps	Heating & Cooling
Air-to-water heat pumps	Heating & Cooling
Smart thermostats	Heating & Cooling
Heat recovery ventilators	Heating & Cooling
Whole house fans	Heating & Cooling
Heat pump water heaters	Water heating
Induction cooktops	Induction Cooking
Heat recovery dish machines	Dishwasher
Aerosol sealing	Insulation
Phase change materials	Insulation
EV chargers	EV Charging
EV-to-home batteries	Solar Battery
Battery Storage	Solar Battery

# Appendix B – How to be a Certified Installer

## Where do I find information on technologies?

- The [Incentives Manual for Professionals](#) contains all information on:
  - Discounts
  - Vendor trainings
  - Points of contact
  - Product procurement
  - Sample bid requests/invoices
- The Professionals Manual is a living document and is subject to change. The current version will be posted on the [Contractor Resources](#) page of the website
- Questions on what you are certified to install? Call (707)324-3223 or email [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org)



# Contractor Network and Profile

<https://scpadvancedenergycenter.org/contractor-network>

- Customers can see all contractors, what technologies they install, and whether they can do financing projects.
- Customers can read your company bio and access your website
- Need a change made to your profile? Request profile edit and necessary corrections via the Contractor Portal at [scpadvancedenergycenter.org/contractor-resources](https://scpadvancedenergycenter.org/contractor-resources)



## Update Profile

To update your online profile, submit your changes here.

Request Profile  
Edit

# How to Bring in Your Existing Customers

## Will I have to bid against other contractors for a customer I bring to the program?

- No, contractors that bring in their own generated leads need to email [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org) with their customer's:
  - Name
  - Email address
  - Phone Number
  - Product they want to install
- The SCP team will use that information to bypass the bidding request process and link the contractor to the customer's project



# Receiving Project Requests

## How do I bid for projects?

- Contractors will receive an automated project request from [Sonoma Clean Power in Chatter <reply@chatter.salesforce.com>](mailto:reply@chatter.salesforce.com) with the customer's:
  - Order number
  - Selected product
  - Address and city
  - Contact information
- The contractor is responsible for reaching out to the customer and conducting a site visit, as applicable
- The contractor will click [Submit Project Bid](#) and submit the project bid based on the project request form you received



## Submit Bid

Submit your bid to an interested customer using this simple form.

Submit Project  
Bid





# Bid Requests from Chatter

## Do I need to create an account? What is Chatter?

- You do not need to create an account or log in to Chatter. All the information you need is directly in the email from Chatter
- Chatter is a platform SCP uses to automatically share customer request for bids to groups of contractors
- The types of technologies you are eligible to install determine the Chatter groups you are apart of
- SCP encourages contractors to get certified in all technologies within your group to maximize your customer lead opportunities
- *Example: You are a certified installer for mini-split heat pumps. You are in the Heating & Cooling Chatter group. You will receive requests for bids for all heating & cooling technologies such as whole house fans, smart thermostats, and heat recovery ventilators*

### Contractor Groups

Heating & Cooling

Water Heating

Induction Cooking

Insulation

Dishwasher

EV Charging

Solar Battery

*Want to be added or removed from a group?*

Contact

[advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org)



# Project Bid Information

## What does my bid need to include?

- Contractor's project bid should include:
  - Contractor company information
  - Customer name, address, and phone number
  - Install site address (if different from customer's address)
  - For each eligible Advanced Energy Center product:
    - Order number
    - Make/model/description
    - Equipment cost (found on product page)
    - Itemized discounts (found on product page)
    - Labor
  - For ancillary materials:
    - Product
    - Description
    - Quantity
    - Unit price

- Or you can use SCP's sample bid as a template located in the [Professionals Manual](#) Appendix E



### CONTRACTOR BID



Bid #:

**DATE:**

Your Company Name  
Street Address  
City, ST ZIP Code  
Phone  
Fax: Fax  
Email

**BID TO:**

[Customer]  
Customer Name  
Street Address  
City, ST ZIP Code  
Phone

**INSTALL SITE:**

SCP Customer Name  
Street Address  
City, ST ZIP Code

**PAYMENT TERMS**

[terms]

**DUE DATE**

[mm/dd/yy]

VOUCHER #	MODEL #	DESCRIPTION	UNIT PRICE	VENDOR DISCOUNT	SCP DISCOUNT	CARE/FERA DISCOUNT	LABOR	LINE TOTAL
Product	Text	Product description	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount
Product	Text	Product description	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount

[VOUCHER #] ANCILLARY MATERIALS ESTIMATE

ANCILLARY MATERIAL	QUANTITY	EXPENSE DESCRIPTION	UNIT PRICE	LINE TOTAL
Product	Number	Product description	\$Amount	\$Amount
Product	Number	Product description	\$Amount	\$Amount

[VOUCHER #] ANCILLARY MATERIALS ESTIMATE

ANCILLARY MATERIAL	QUANTITY	EXPENSE DESCRIPTION	UNIT PRICE	LINE TOTAL
Product	Number	Product description	\$Amount	\$Amount
Product	Number	Product description	\$Amount	\$Amount

Total Discounts	
Subtotal	
Sales Tax	
<b>Total Due</b>	

This bid is based on vouchers and associated products listed above, including labor itemized for installation of each product and estimates of ancillary materials. All listed information must be completed by the contractor for this bid to be valid.

By signing and dating below, the receiving customer listed above accepts this bid:

Customer Signature:	Date:
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# Customer Selects Bid

## Can I proceed with the project once I submit a bid?

- A project bid request goes out to all contractors who are in the technology group certified to install the product the customer selected
- A customer may receive several bids before selecting a contractor
- Once a customer has selected a bid, the customer emails [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org) and cc's the contractor they have selected

## On-Bill Financing Projects Only:

- The customer and SCP sign an On-Bill Financing Agreement that states what products are *approved for installation* in Exhibit B. The executed On-Bill Financing Agreement is authorization to begin installation. The selected contractor must review the Exhibit B prior to product procurement and installation.
- Products not approved for On-Bill Financing can only be installed if the customer and contractor agree that the work will be paid directly by the customer.



# Project Deposits and On-Bill Financing

## **I require a deposit to start installation, who is responsible for payment?**

- The customer is responsible for project deposits for both rebate-only and financing projects
- For on-bill financing, SCP will cover 100% of the approved project costs after close-out
  - The approved costs are in Exhibit B of the customer's executed On-Bill Financing Agreement
- The contractor and customer are responsible for coordinating the contractor's repayment of any deposit or progress payment back to the customer



# On-Bill Financing Only: Change Orders

## What if there's a change in project scope or equipment?

- On-Bill financing projects require change orders that must be approved prior to making changes
- The customer must email [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org) cc'ing the contractor that a change order is necessary
- The Contractor submits a revised bid using the [Submit Project Bid](#)
- SCP will review the change order. If approved, the customer and contractor will receive an amended On-Bill Financing Participation Agreement Exhibit B



### Submit Bid

Submit your bid to an interested customer using this simple form.

Submit Project  
Bid



# Product Procurement

## How and where do I get SCP discounted equipment?

- Participating vendors supply products at specially negotiated prices
- Procurement information for products can be found in the [Incentives Manual for Professionals](#) Appendix
- When placing an order, the **contractor provides the vendor the customer's order number** to access SCP's specially negotiated vendor discount
- Exception: Approved A.O Smith and Rheem water heater models may be purchased from any retailer
- *Reminder: Contractors must be certified to install the product prior to purchase to receive discounts*



# BayREN Home+ Rebates

## A. O. Smith Voltex Hybrid Heat Pump Water Heater

Choose:

6 year warranty

Base Price:

\$2038

does not include installation fee

SCP Rebate:

\$1700

Vendor Rebate:

\$0



## Why do I need to be a BayREN Home+ Contractor?

- SCP is stacking incentives to offer a maximized local discount on equipment for customers
- The SCP Rebate on the website for heat pump water heaters includes the SCP (\$700) and Home+ (\$1,000) rebate

## What if a project doesn't qualify for a BayREN Home+ rebate?

- SCP will backfill rebates for projects that do not qualify for Home+, however there must still be a record that the contractor submitted the project through the BayREN Home+ program

# BayREN Home+ Contractor

## What technologies require a Home+ Contractor?

- Heat pump water heaters and mini-split heat pumps require a BayREN Home+ Contractor

## Do I need to submit documentation to both SCP and BayREN Home+?

- Yes, the contractor is responsible for submitting all required documentation to both programs. Required documents may vary for each program

## Do projects in Mendocino require a BayREN Home+ Contractor?

- Yes, heat pump water heater and mini-split heat pump projects require a BayREN Home+ contractor in Mendocino and Sonoma County

## How do I become a BayREN Home+ Contractor?

- Contact Tony Jung, [tony.jung@clearesult.com](mailto:tony.jung@clearesult.com) to get listed for the Home+ program





# BayREN Home+ Rebates: Induction

## Do I need to be a Home+ contractor to install induction equipment?

- No, induction equipment is the only equipment eligible for the BayREN Home+ rebates that does not require BayREN Home+ contractor
- For customer projects that are not On-bill financing:
  - Customer may work with a contractor or may self-install
  - Customer or their contractor purchases cooktop through vendor to receive vendor discount
  - Customer submits project documentation on Home+ Customer Portal to receive \$300
- For customer projects that are On-bill financing :
  - Customer **must** work with an On-bill financing contractor
  - On-bill financing contractor purchases cooktop through vendor to receive vendor discount
  - Customer submits project documentation on Home+ Customer Portal **AND** customer signs the \$300 incentive over to the On-bill financing contractor
- *Note: If a customer won't sign over a Home+ incentive to their On-bill financing contractor, the customer can no longer use On-bill financing to pay for their induction project*



# Project Close-Out

- Upon project completion, close-out documentation is submitted by clicking [Close Out Your Project](#)
- The contractor is responsible for submitting:
  - Closed-out permit, if applicable
  - Final invoice
  - Signed Notice of Completion
- The Notice of Completion must be signed by the Customer and Contractor once the project is done
- Contractors can find the Notice of Completion in the Professionals Manual Appendix H

**On-Bill Financing Projects Only:** Closed out projects will be reviewed, approved, and submitted for payment for the approved amount in the On-Bill Financing Agreement Exhibit B in net 30 days

 If permits are delayed by jurisdiction, please contact SCP to discuss close-out assistance to expedite payment



## Complete Project

Use this form each time a project is completed.

Close Out Your  
Project

# Subcontractors

## Do my subcontractors need to be a participating contractor?

- If the subcontractor is responsible for purchasing the equipment, they must participate as a rebate-only contractor to access specially negotiated vendor discounts
- If the subcontractor is providing an additional service such capping off the gas line or upgrading the service panel, they do **not** need to be a participating contractor
  - The primary contractor may be liable for their subcontractor if they are not a participating contractor
  - The subcontractor must add their services and associated costs to the primary contractor's bid and invoice



# Contractor Application and Requirements

**How does my subcontractor or fellow contractors get involved?**

## **Rebate-Only *and* On-Bill Financing Requirements**

- Complete a [Contractor Application](#)
- Sign the Contractor Memorandum of Understanding
- Name SCP as additionally insured and send a Certificate of Liability Insurance to [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org)

## **Additional On-Bill Financing Requirement (not for subcontractors)**

- Sign the On-Bill Financing Contractor Memorandum of Understanding
- Attend live webinar or watch webinar recording of [Contractor Certification Course: On-Bill Financing](#)
- Email [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org) upon webinar completion



# Thank you!

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