



FY19  
SRP Business Solutions  
Energy Efficiency Alliance  
Participant Manual

May 1, 2018

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## 1.1 WELCOME TO THE SRP ENERGY EFFICIENCY ALLIANCE

Welcome! We are pleased that you are interested in joining the SRP / EEA team. An SRP Energy Efficiency Alliance (EEA, or Alliance) member, you have the opportunity to grow your business through your association with SRP. EEA members have access to marketing and promotional material, training opportunities, and more. Plus, EEA membership provides a contractor with the “power of legitimacy” as a vetted energy professional in the SRP service territory.

SRP’s objective through the Alliance is to work together towards furthering energy efficiency, education in technology and rebate application support. Our goal is to support EEA members in providing the best in product and services to our customers, SRP’s energy users. The EEA program values EEA member contributions and we look forward to your commitment as a trade ally partner. Thank you for participating – we look forward to working with you.

## 2.1 BENEFITS

Measures in the SRP *Standard and Custom Business Solutions* programs do not require installation by an SRP approved Energy Efficiency Alliance (EEA, or Alliance) member. An approved EEA member can benefit from a number of advantages that a non-participating contractor will not have access to.

### **SRP Energy Efficiency Alliance Certificate**

- As an official partner of the EEA program, you can display an EEA program certificate, and identify yourself on company website and printed collateral, including business cards, as an “SRP Energy Efficiency Alliance participant.”

### **SRP Business Solutions Program Rebates**

- Many SRP programs feature rebates that defray the cost of installation of energy efficient equipment and materials - that shorten project payback and help you close sales.

As an EEA member, the process for applying for rebates is reviewed with your company. EEA members have access to group and individual mentoring sessions that walk you through using the incentive application tools, helping you become an expert in simplifying the rebate process for the end use customer. These tools provide you to guide the customer through the energy efficiency decision.

### **SRP Program Materials and Collateral**

- SRP has designed numerous program pieces that inform customers about energy efficient equipment that is eligible for rebates. From fact sheets to case studies, SRP provides EEA members with access to this collateral – all you have to do is ask! SRP has even placed customer testimonials on the webpage, easily accessible by EEA members for use in any customer meeting as deemed appropriate.

### **Valuable Resources Via [www.savewithsrpbiz.com](http://www.savewithsrpbiz.com)**

- Providing businesses with access to information that EEA members can leverage to assist customers. The following topics are covered:
  - Rebates and incentives hotlinks that connect EEA members to information on specific rebate programs
  - Online energy tools including:
    - Energy use link: where typical energy consumption of electric equipment is depicted in easy to understand pie charts for numerous building types – from Congregations to Warehouses.
    - Energy advice link, where EEA members can connect the customer to an on-line guide for saving energy, hot link to Energy Star and other industry specific webpages, as well as walk the customer through signing up for a quarterly newsletter.
    - Lighting Application: access the most up-to-date version of the excel based lighting workbook.
    - Non-lighting Application: access the most up-to-date version of the excel based application that covers all measures that are not lighting measures.
    - Customer Video testimonials.... and so much more!

### **Education and Training**

- EEA members have the opportunity to participate in training designed to increase both technical and sales expertise, specifically related to the rebate programs. SRP’s training includes, but is not limited to, equipment eligibility, rebate amounts, the application process, and the anticipated customer energy and cost savings associated with qualifying high-efficiency equipment.

**Notification of Program Updates**

- EEA members will receive advance notice of events, updates, and promotions to the *SRP Business Solutions* portfolio of programs.

**Newsletters**

- Information regarding energy efficient technologies, program updates, project recognition, and tips for successful energy efficiency projects is distributed via electronic newsletters to EEA members.

### 3.1 EXPECTATIONS OF ALLIANCE PARTICIPANTS

SRP retains the right to require that EEA members renew membership or reapply for membership on an annual basis. Existing EEA members will receive information and instructions for renewal in advance of renewal deadlines. Ongoing EEA membership will depend on your company meeting the requirements defined in this manual and the *FY18 Energy Efficiency Alliance Application and Participation Agreement*.

#### **EEA Members Are Expected To:**

- Maintain positive customer reviews, including satisfactory resolution to customer complaints
- Offer accurate program information to customers
- Assist customers with the application process
  - Submit complete and accurate applications
  - Provide required supporting documents, marked as necessary to identify and match products to workbooks and rebate applications
  - Ensure that all customer information fields are accurate and complete
  - Respond to requests for clarification and additional information in support of applications in a timely manner
- Adhere to all permitting and licensing requirements
- Conduct honest and ethical business practices, including:
  - Avoiding conflicts of interest
  - Fulfilling all contractual obligations
  - Refraining from submitting fraudulent or inaccurate information
  - Maintaining strict confidence of the SRP's customer information
  - Accurately representing programs to customers / other parties
  - Accurately providing information to SRP
- Keep relevant records and documentation
- Follow marketing and branding guidelines as provided in the **Marketing Guidelines** section

#### **EEA Performance Standards**

- An approved EEA member is required to:
  - Act with integrity, and as such do not disparage other EEA members to the customer (verbally, in writing, etc.);
  - Treat customers participating in the SRP rebate programs fairly and respectfully, delivering services on time and as promised;
  - Act with honesty, making no false claims about savings, equipment performance, or engage in conduct that would be construed as fraudulent or deceitful;
  - Properly represent the EEA member company's relationship with SRP as an independent contractor;
  - Display professionalism in its conduct, treating customers with respect;

- Utilize subcontractors that add value to the SRP rebate program, its business and image and not utilize subcontractors that have been suspended or terminated from a SRP program.

EEA members that are out of compliance with the EEA membership requirements or the Trade Ally Performance Standards (noted above) may be subject to probation, suspension, or removal from the program. Offer accurate program information to customers

#### 4.1 REBATE APPLICATIONS

- Send all rebate applications and responses to requests for additional information to the [savewithsrpbiz@srpnet.com](mailto:savewithsrpbiz@srpnet.com) email address – this mailbox is monitored by multiple processors and will ensure fast response time
- Take advantage of the On-Line Portal. Submit application through an on-line downloading system with many advantages beyond email.
- Send only the pages that are needed for supporting documentation
- To ensure that emails are not kicked back, limit the total attached file size to 10MB per email
- If you need to split up the email due to the 10MB size constraint, be sure to link multiple emails together in the subject line (e.g., "Part 1 of 2," "Part 2 of 2")
- Use this subject line format for Pre-Approval Applications: New Project - [insert Customer Name]
- Use this subject line format for Final Applications: SRP Final - [insert project ID - insert customer name]
- A tracking number will be issued for each project - use that tracking number in all communications regarding specific projects.

*Tip: Refrain from sending the submittal rebate applications directly to outreach staff – the mobile nature of our business has the outreach team constantly on the move. We'd hate for a rebate to sit in an inbox when someone is out of the office – regardless of whether it's for 4 hours or 4 days. The processing team is staffed daily, with the primary function of processing rebates for SRP. Do proactively having your Outreach Representative review your preliminary application prior to submittal.*

#### 4.2 INQUIRIES

EEA members are encouraged to contact an EEA program outreach representative with any questions or concerns.

#### 4.3 CUSTOMER COMPLAINTS

Notify an EEA program outreach representative right away should there be any customer complaints about a project that is receiving a rebate.

#### 4.4 CUSTOMER MEDIATION

From time-to-time customers contact SRP with complaints. In the event this occurs, the EEA program will contact the EEA member to collaborate and work to resolve the situation.



### 5.1 PROGRAM/TOOL TRAINING

Program, process, and tool training are offered to all EEA members, and approved EEA members are expected to participate in these training sessions.

### 5.2 APPLICATION REVIEW

Incomplete project applications will be rejected and returned to the submitting EEA member for completion. All projects receive a desk QA/QC verification to ensure customer and measure eligibility, accurate savings and rebate levels. Should clarifications be required, rebate program staff will contact the EEA member via phone or email to request additional/clarifying information.

### 5.3 PRE-INSTALLATION INSPECTIONS

Small Business, Custom, and even standard business projects may be selected for pre-inspection before approval is given to install equipment. When a project submitted by an EEA member is chosen for inspection, rebate program staff will notify the EEA member.

### 5.4 POST INSTALLATION INSPECTIONS

Completed projects are subject to a post-installation inspection and are selected on a random basis. Typically, this involves inspecting a representative sample of all qualifying measures. If a project fails post-installation inspection, additional inspections will be conducted to ensure all measures are installed as per the rebate application documentation. There may be cases where the final incentive application and subsequent rebate amount are modified (increased or decreased) as a result.

Promotional material and collateral is provided to EEA members so that members may provide accurate and timely program material to customers, as well as allow EEA members to maximize its affiliation with SRP. Clear direction is provided below on what an EEA member can and cannot say, and write or promote about SRP. These guidelines are intended to help EEA members accurately promote their association with the SRP rebate programs.

EEA members that do not follow the promotional guidelines may be removed from the network.

**EEA Members May:**

- Tell customers that you are an “SRP Energy Efficiency Alliance (EEA) participant.”
- Use the branded materials made available to you by SRP, such as program brochures, fact sheets and case studies.
- Use links and URLs to link to SRP collateral on EEA member company webpages.
  - Participate in SRP’s (program name) and you may be eligible for rebates. Call 602-236-3054 or visit [www.savewithsrpbiz.com](http://www.savewithsrpbiz.com) for program information.
- Use either of the following approved messages on the EEA member’s website and printed collateral, including business cards, to promote EEA member status:
  - (EEA trade ally) is an SRP Energy Efficiency Alliance participant
  - SRP Energy Efficiency Alliance participant

**EEA Members May Not:**

- Represent yourself as SRP, a subcontractor of SRP, or state that you are calling on behalf of SRP.
- Although you may use the approved language described above, you may not use the utility and energy efficiency program *logos* on any materials you create. Utility and energy efficiency program logos are not to be used on company business cards, invoices, brochures, advertising, clothing, website, presentations, slides or any other communications material.
- Mention the rebate amount in any marketing materials.

**Is there a maximum or minimum rebate amount that I can receive from this program?**

Customers are limited to \$300,000 per customer per program year for all programs offered by SRP. There is no minimum rebate amount required for participation in SRP Business Solutions Small Business Program. Rebate payments under the program are made to the participating Small Business Program Alliance Participant and are subject to program rules and eligibility requirements.

**What's the benefit to SRP for having an Energy Efficiency Alliance network?**

SRP will build relationships with trade allies that result in increased sales of high efficiency equipment and services to their customers; translating to high customer satisfaction and increased energy savings for their programs.

**Will SRP recommend EEA members to their customers?**

No. However, SRP and Nexant will direct customers to the listing of EEA members on the SRP website.

**Do I need to be in the EEA network to help my clients receive rebates?**

No, participation in the EEA network is optional. We do want to point out that companies that choose to participate in the network will have special access to resources that will not be available to all.

**If I have any additional questions, who can I contact?**

Nexant, SRP's program implementation contractor for the trade ally program, will respond to any questions or concerns you may have.

**Will SRP provide any of their customer information to participants in the EEA Network?**

No, customer information will not be provided by SRP to trade allies

**Can you show me some examples of how you have helped other EEA members?**

SRP has provided both hard copy case studies, as well as on-line video testimonials that illustrate how SRP and participating trade allies have successfully helped customers select and install high efficiency equipment. We are always looking for success stories and projects to highlight as case studies!

SRP will distribute program updates, code changes, technical articles, event invitations, and even feature trade ally success stories – via newsletters and e-blasts to the EEA network.

**Is a payment required to enroll in the EEA network?**

There is no payment to enroll in the network. Please work with one of our outreach staff to fully understand what program participation will mean to your business.

**Can I use the SRP logo (pulled from the website or otherwise) on my marketing and advertising material?**

No, the SRP logo is property of SRP and use of the logo is not permitted.

**If a contractor (that is not an EEA participant) helps a customer apply for a rebate, will they automatically be signed up for this program?**

No.

**Will I have to renew my membership in the EEA network annually?**

SRP may require that alliance members renew or reapply for membership on an annual basis. Existing members will receive information and instructions for renewal in advance of renewal deadlines.

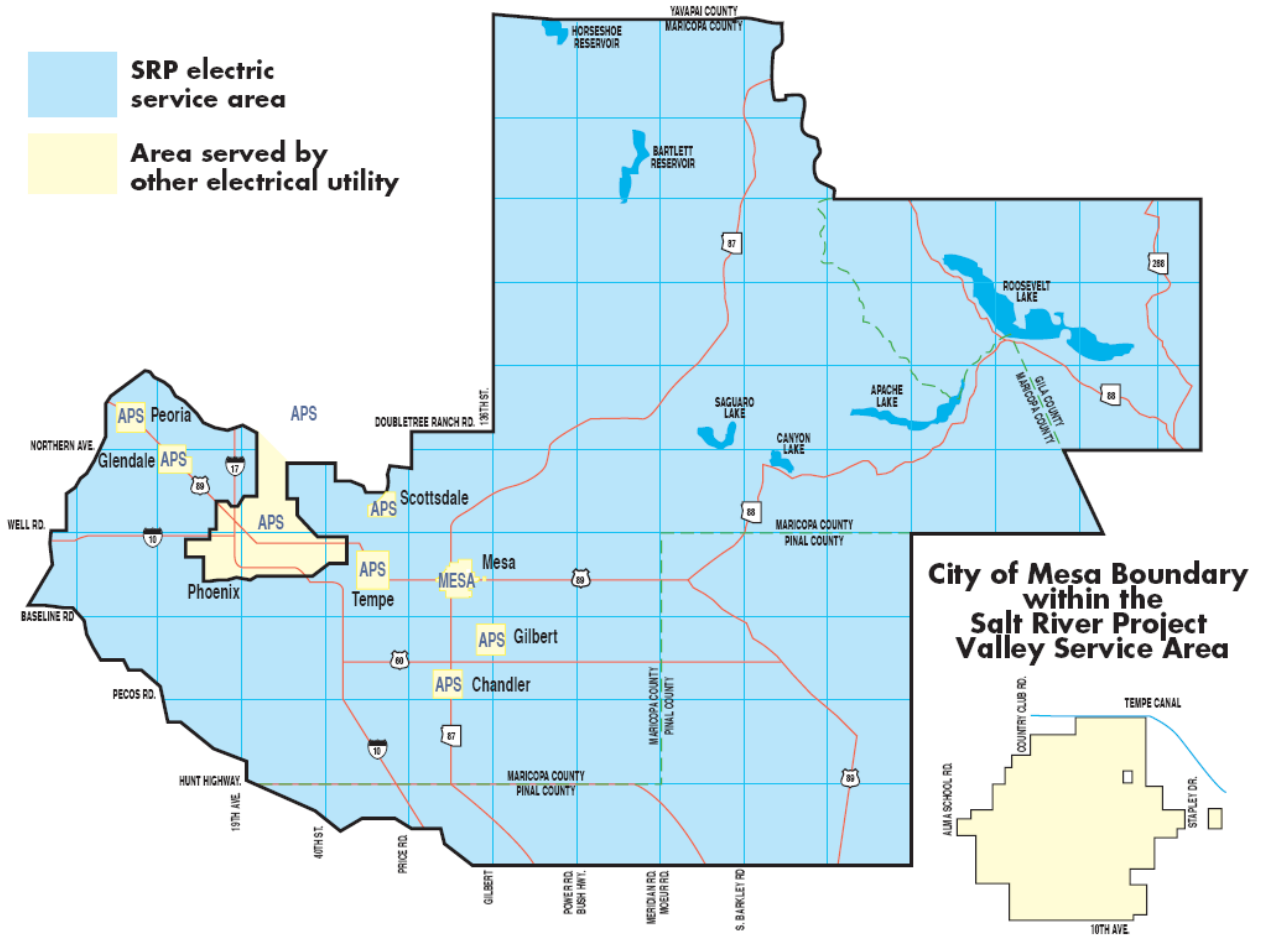
**Is it better to have one person as the “key contact” for our company?**

We don't mind multiple contacts – in fact, we encourage it! We understand that you are busy running your business, and we want to make certain that any program updates, newsletters, or other mailings are shared within your company as soon as they can be.

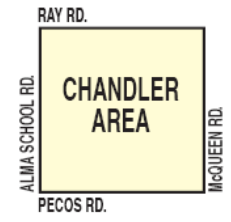
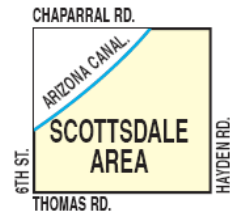
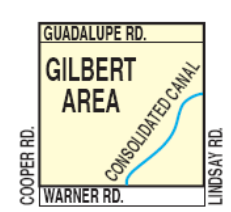
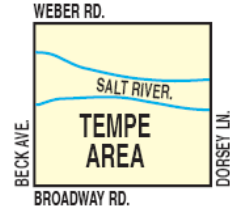
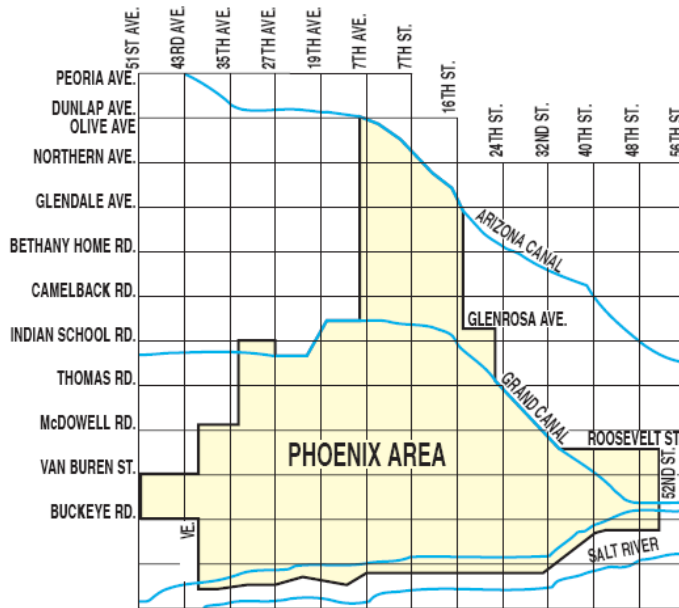
**My company has multiple offices/branches; do we need to enroll each?**

Yes. You have different contacts at each location, and likely are operating under different contractor licenses.

An illustration of SRP’s service area is provided below. A more detailed map of SRP service area is available by contacting the Program Administrator.



### APS Boundaries within the Salt River Project Valley Service Area





Customer informational hotline: (602) 236-3054

[www.savewithsrpbiz.com](http://www.savewithsrpbiz.com)

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