

# Handbook

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## SECTION 1 - INTRODUCTION / OVERVIEW

### 1.1 COMMON TERMS USED IN HANDBOOK

The table below lists several commonly used terms included in this handbook, along with the respective alternative forms of the terms. Both versions of each term can/will be used interchangeably throughout the handbook.

Commonly Used Term	Alternative Form
Pacific Power	Utility
Program Implementer (Evergreen)	Program Administrator
Wattsmart Business Vendor Network	Network
Wattsmart Business Vendor(s)	Vendor(s)
Wattsmart Business Premium Vendor(s)	Premium Vendor(s)
Wattsmart Business Customer(s)	Customer(s)
Wattsmart Business Program	Program
Wattsmart Business Program Coordinator	Coordinator
Wattsmart Business Vendor Network Requirements	Network Requirements
Wattsmart Business Vendor Application Agreement	Agreement
Wattsmart Business Vendor Network Application	Application

### 1.2 WATTSMART BUSINESS VENDOR NETWORK

Contractors, distributors, and other trade professionals who sell, install, or specify energy-efficient products can apply to participate in Pacific Power’s Wattsmart Business Vendor Network. The Network enables Pacific Power and Vendors to collectively serve their mutual customers. Pacific Power assists Vendors in marketing the advantages of high-efficiency electrical equipment to eligible customers by providing materials such as brochures and case studies, identifying cost-effective installation opportunities, and assisting customers with obtaining incentives.

The Program may recognize top-performing lighting Vendors participating in the typical lighting program in Washington\* as Premium Vendors based on program participation, project quality, application submission quality, industry training and customer and program feedback. Premium Vendors may enjoy enhanced Network benefits as described in [Section 2.1 Vendor Benefits](#). \*The Premium Vendor designation is not currently available in California.

This handbook is designed for use by approved Wattsmart Business Vendors and outlines the benefits, criteria, and expectations of the Wattsmart Business Vendor Network. Vendors may participate in other programs offered by the Wattsmart Business Program including Instant Incentives and Small Business Lighting, all of which are not outlined herein.

The handbook also provides an overview of the available Wattsmart Business incentives, eligibility requirements, and provides a description of the expected participation steps to complete customer projects within the Wattsmart Business Program.

### 1.3 WATTSMART BUSINESS PROGRAM

The Wattsmart Business Program offers a variety of services and incentives designed to encourage Pacific Power customers to incorporate energy efficiency into their businesses. The program is available to qualifying non-residential facilities receiving electric service from Pacific Power on a qualifying rate schedule as listed in [Section 3.2.1 Verifying Eligible Rate Schedules](#).

Incentives may be available for qualifying equipment that increases electric energy efficiency. Customers should contact the program or a Wattsmart Business Vendor before purchasing equipment to see if incentives may be available for equipment installed as part of retrofit, major renovation, or new construction projects. Incentives are paid directly to qualifying customers following the installation of qualifying equipment and approval by Pacific Power. Qualifying customers include building owners and electricity users whose projects are completed at an eligible business customer facility that receives electric service from Pacific Power on a qualifying rate schedule. Incentives may be assigned to a third-party, such as a Vendor, designated by the eligible participant when the appropriate payment release form is completed.

### 1.3.1 WATTSMART BUSINESS PROGRAM BY STATE

Pacific Power offers the Wattsmart Business Program to help commercial, industrial, and agricultural customers save energy and money. Click below to see what incentive options may be available in each state served by Pacific Power. Please note: incentives are available in Oregon, however this program is administered by the Energy Trust of Oregon and is not a part of the Wattsmart Business Vendor Network.

- [California](#)
- [Washington](#)

## SECTION 2 - NETWORK PARTICIPATION

### 2.1 VENDOR BENEFITS

The Pacific Power Wattsmart Business Vendor Network provides approved Vendors who meet program requirements with training, recognition, and support, as described in the Vendor Benefits table below.

#### Wattsmart Business Vendor Benefits

##### Program Recognition

- Vendor name and contact information listed in the Pacific Power Search tool promoted to Pacific Power customers.
- Certificate of Participation as Wattsmart Business Vendor.
- Eligible to receive Wattsmart Business Vendor awards.

##### Instant Project Updates

- Access to project status via the online [Vendor portal](#).

##### Incentive Calculators

- Access to proprietary incentive calculator tools.

##### Project Support

- Dedicated Wattsmart Business coordinator to support your business efforts.

##### Marketing Support

- Wattsmart Business program marketing materials.
- Use of Wattsmart Business Vendor logo as described in Marketing Guidelines.

##### Training Opportunities

- Technology and program training.

##### Program Communication

- Be the first to know about program changes with program eblasts and quarterly newsletters.

#### Wattsmart Business Premium Vendor Benefits

##### Program Recognition

- Elevated Listings on the online Find-a-Vendor tool

##### Marketing Support

- Access to premium marketing content in the Marketing Toolkit.
- Improved customer visibility

##### Project Support

- May receive exemptions from some project inspections.

#### 2.1.1 WATTSMART BUSINESS VENDOR NETWORK PORTAL

The Wattsmart Business Vendor [portal](#) provides valuable resources including:

- Access to project status of program submissions.
- Privileged access to on-demand incentive calculator tools.
- Easy to find forms and program materials including marketing collateral.

- Upcoming events hosted by Pacific Power and others.
- Up-to-date information about program incentives and changes.
- A Network Vendor search tool that customers can use to locate Network Vendors in their area.
- The ability to make real-time updates to your company contact information.
- News about upcoming Network events and training opportunities.

To learn more about the Network, the Network Portal, or to apply to become a Participant, [click here](#).

## 2.1.2 RESOURCES

As described in [Section 2.1 Vendor Benefits](#), several resources are available to approved Wattsmart Business Vendors. Once a complete Wattsmart Business Vendor application has been received and approved, Vendors will be given instructions and access to the following resources:

- Marketing Resources
- Program Coordinators
- Calculator Tools

## 2.2 BECOMING A VENDOR

Becoming a part of the Wattsmart Business Vendor Network comes with benefits as well as responsibilities. The steps below outline the process to become a Vendor or obtain special recognition as a Premium Vendor:

Vendor eligibility:

1. Submit a Wattsmart Business Vendor Network Application for review and approval.
2. Review, become familiar with, and abide by the terms and conditions of current versions of the Wattsmart Business Vendor Network Application Agreement, [Network Requirements](#), and Vendor Handbook.

Premium Vendor eligibility (available in Washington at this time):

Lighting Vendors must meet the following minimum prerequisites to be considered for Premium status:

1. Be an approved Wattsmart Business Vendor for a minimum of one year.
2. Have completed five or more Wattsmart Business typical lighting incentive projects year-to-date.\*
3. Employ at least one full-time staff member who holds an enhanced credential or certification as listed below. Credentials and/or certificates must be uploaded to your account in the [Network Portal](#).
  - [NXT Level 1 designation](#) - company/branch must complete the application process and at least one individual must earn the designation
  - [NCQLP Lighting Certification](#)
  - [NALMCO's Certified Lighting Management Consultant](#)
  - [AEE's Certified Lighting Efficiency Professional](#)

All lighting Vendors are evaluated quarterly based on program participation, project quality, application submission quality, industry training and customer and program feedback. The top-performing Vendors are then designated Premium Vendors and notified of their status.

\*Typical non-lighting, Custom, Small Business and Lighting Instant Incentive projects are not included in reviews for Premium Vendor selection.

## 2.3 PARTICIPATION REQUIREMENTS

The criteria to become and remain a Network Vendor include, but are not limited to, those listed in the table below.

### Wattsmart Business Vendor Participation Requirements

#### Network Participation

- Maintain current company contact information in program systems.
- Maintain current, valid business and/or contractor's licenses as applicable by federal, state and local laws where work is performed as described in [Network Requirements](#).
- Maintain general liability, workers compensation & auto insurance as described in Network Requirements.
- Vendor evaluation period may be required before the Vendor is accepted into the Network and listed in the customer search, [Section 2.3.2 Evaluation Period](#).

#### Program Participation

- Project completion requirements: 1) Complete at least one project installation in the past twelve months, or 2) submit at least one valid new project in the past twelve months, or 3) have at least one active project in the current year.
- Utilize current version of incentive calculator.
- Recommend and install energy-efficient technologies in accordance with Pacific Power and Program/Network standards.
- Meet project submission standards as listed below in [Section 2.3.1 Participation Criteria Details](#).
- Meet project satisfaction requirements including positive customer & coordinator feedback as listed in [Section 2.3.1 Participation Criteria Details](#).
- Positively promote the utility and program to all eligible customers.
- Attend and require applicable representatives to attend Utility-sponsored training and/or seminars at a minimum of one annual Vendor event and one periodic meeting per year or two periodic meetings per year.
- Adhere to program marketing guidelines as listed in [Appendix E](#) including distribution of Program-approved marketing materials and use of Utility logo.
- Successfully complete and submit Program related documents as provided by Utility or Program Administrator and available on Utility's website and listed in [Section 2.3.1 Participation Criteria Details](#).

#### Industry & Program Knowledge

- Participate in Program Network training & incentive calculator training.
- Possess experience selling and/or installing energy efficient equipment.
- Maintain positive Program performance history that Program staff deems satisfactory.
- Lighting Vendors must demonstrate technology competency by completing the [Northwest Lighting Network's Lighting Basics course](#), or by having one full-time staff person holding a qualifying certification including [Lighting Certification \(LC\)](#), [Certified Lighting Management Consultant \(CLMC\)](#) or [The Certified Lighting Efficiency Professional Program \(CLEP™\)](#).

#### Program Service Expectations

- Familiarity with the current Program, its processes, offerings, and requirements.
- Servicing customers and promoting the Program positively.
- Performing quality workmanship.
- Delivering customer satisfaction and education.
- Responding promptly to customers and Utility inquiries.

## Wattsmart Business Vendor Participation Requirements (Continued)

## Program Service Expectations (continued)

- Informing customers of 1099 reporting related to incentive payments.
- Informing customers they may be asked to respond to calls from program evaluators up to three years after project completion. Vendors are to cooperate with evaluators and answer questions as requested.
- Recommending and delivering quality energy efficiency upgrades to customers based on the applicable state energy code and/or program requirements per state and IES3 guidelines for the facility type.<sup>1,2</sup>
- Providing a safe work environment.
- Correctly disposing of all hazardous waste materials, including ballasts, fluorescent tubes, and any other items in compliance with the laws and regulations of the state in which the project is completed. Example provided in [Section 9, Appendix D](#).
- Conducting business in an honest and ethical manner and in accordance with all applicable laws and Program requirements.
- Invoicing customers with a breakout of material costs, labor costs, and other costs identifying the materials and services provided. If the incentive is assigned to the Vendor, the incentive discount is line-itemed on the invoice.
- Applying sales tax in accordance with laws and regulations of the state in which the project is completed.
- Correcting, at Vendor's cost and expense, problems/defects relating to equipment warranties according to minimum technology/industry standards.

<sup>1</sup>As an example, with correct inputs, the lighting calculator will provide the project LPD and code required LPD for comparison.

<sup>2</sup>Include in Vendor's contract with the customer the minimum technology/industry/manufacturer standard warranty for the equipment installed.

<sup>3</sup>In the event that any applicable statute, regulation, ordinance or code conflicts with those standards, it shall have precedence over those standards.

### 2.3.1 ADDITIONAL PARTICIPATION REQUIREMENTS

1. **Project Submission Standards** – Expectations of a complete project submission and a satisfactory inspection are described below:

All Vendors shall provide complete and accurate project submissions in compliance with the Program documentation submission requirements. Any variance found between the initial project submission and the information provided when the project is completed, will be used to assess Vendor performance in the Network. Any discrepancies found during application reviews or inspections will be viewed as poor performance and may be cause for additional action, a reduction in Network benefits, or removal from the Network. All Vendors shall cooperate fully with the review and inspection process and provide further information or documentation as requested. Additional standards include, but are not limited to, the following sections of Vendor Handbook: [Section 3.5 Project Submission Follow-up](#) and [Section 4.6 Project Inspection Policy](#).

2. **Project Satisfaction Requirements** – Elements of a satisfactory project, including positive customer and coordinator feedback are described below:

At any time during the submission process of a project or after it has been completed, feedback may be obtained from the customer or the coordinator about their experience with the Vendor who performed work on the project. This feedback will be used to assess Vendor performance in the Network.

3. **Program Service Expectations** – Requirements for Vendors when performing and providing services to Pacific Power customers are described in [Section 3 Program Processes and Procedures](#).

Vendor performance will be assessed by the ability to meet the Participation Requirements. Additional requirements include, but are not limited to, [Section 4.1 Code of Conduct/Ethics](#).

### 2.3.2 EVALUATION PERIOD

At any time, program staff reserves the right to require an evaluation period and to limit a Vendor's access to the Network benefits described in [Section 2.1 Vendor Benefits](#). This may include, but is not limited to, excluding Vendor from Pacific Power Vendor Search Tool. The evaluation period may include having the Vendor complete a minimum number of Program projects, complete Program and Network training, and obtain a satisfactory review of customer testimonials regarding the Vendor's services.



## SECTION 3 - PROGRAM PROCESSES AND PROCEDURES

### 3.1 HANDLING INQUIRIES

Vendors must respond to all inquiries from Pacific Power, Program staff, and Wattsmart Business Vendor Network customers within two (2) business days. Inquiries may include responding to Program staff project submission questions and documentation requests, answering customer questions, or scheduling inspections of a customer’s facility where work has been performed related to a requested incentive.

### 3.2 VERIFYING ELIGIBILITY

Vendors are responsible for verifying that the project site, applicant, project, and equipment are eligible for incentives. The definitions below explain who is eligible for energy efficiency incentives:

- **Energy Efficiency Incentive:** Payments of money made by Utility (Pacific Power) to Owner/Customer for installation of an energy efficiency measure pursuant to an executed Incentive Offer Letter or approved application.
- **Customer:** Any party who has applied for, been accepted and receives service at the real property, or is the electricity user at the real property.
- **Owner:** The person who has both legal and beneficial title to the real property, is the mortgager under a duly recorded mortgage of real property, or the trustor under a duly recorded deed of trust.

#### 3.2.1 VERIFYING CUSTOMER ELIGIBILITY ON ELECTRIC BILL

Customer eligibility can be verified by reviewing a copy of the customer’s recent Pacific Power electric bill and confirming their receipt of electric service on a qualifying rate schedule as provided above. Figure 3 provides an example of where to find customer information including account number, facility address, rate schedule, and meter number on a typical Pacific Power customer bill.

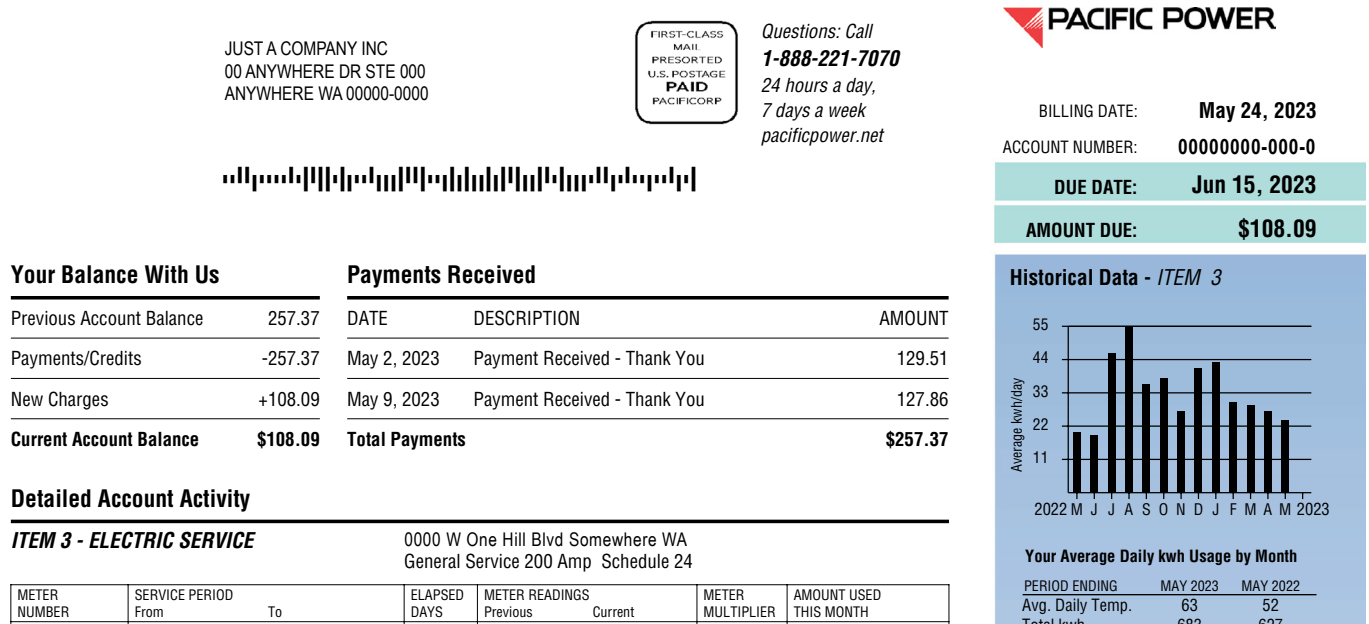


FIGURE 3 1: PACIFIC POWER CUSTOMER BILL

Requesting a copy of the customer’s recent Pacific Power bill is one option to determine customer eligibility. Another option is to verify their eligibility online at [WattsmartIncentives.com/eligibility](http://WattsmartIncentives.com/eligibility). In the event that a customer account is unavailable, for example with new construction projects, Vendors may contact [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy) or call 509-210-5011 to obtain assistance confirming customer eligibility. Be prepared to provide the customer name, facility address where the equipment will be installed, and account and/or meter number if available.

### 3.2.2 VERIFYING ELIGIBLE RATE SCHEDULES

Eligible project sites include both existing and new construction commercial, industrial, and agricultural facilities within the states of California and Washington. In order to be eligible, the facility must receive electrical service from Pacific Power on one of the eligible electric service rate schedules. Click on the appropriate state tariff below to find rates schedule lists.

[California](#)

[Washington](#)

### 3.2.3 VERIFYING EQUIPMENT ELIGIBILITY

Minimum equipment efficiency requirements have been developed for high-efficiency Lighting, HVAC, Motors & VFDs, Building Envelope, Food Service, Appliances, and Other measure categories. This information can be found by going to the program website: [www.BeWattsmart.com](http://www.BeWattsmart.com).

### 3.3 CUSTOMER PARTICIPATION PROCESS

This section provides an overview of the Vendor's role in assisting the customer to receive incentives for qualifying equipment under the Wattsmart Business Program. Incentive assignment is an option but customers may choose to receive incentives directly.

FIGURE 3-2 WATTSMART BUSINESS VENDOR PRE-PURCHASE INCENTIVE PROCESS

Incentive Process for Lighting & Custom Measures

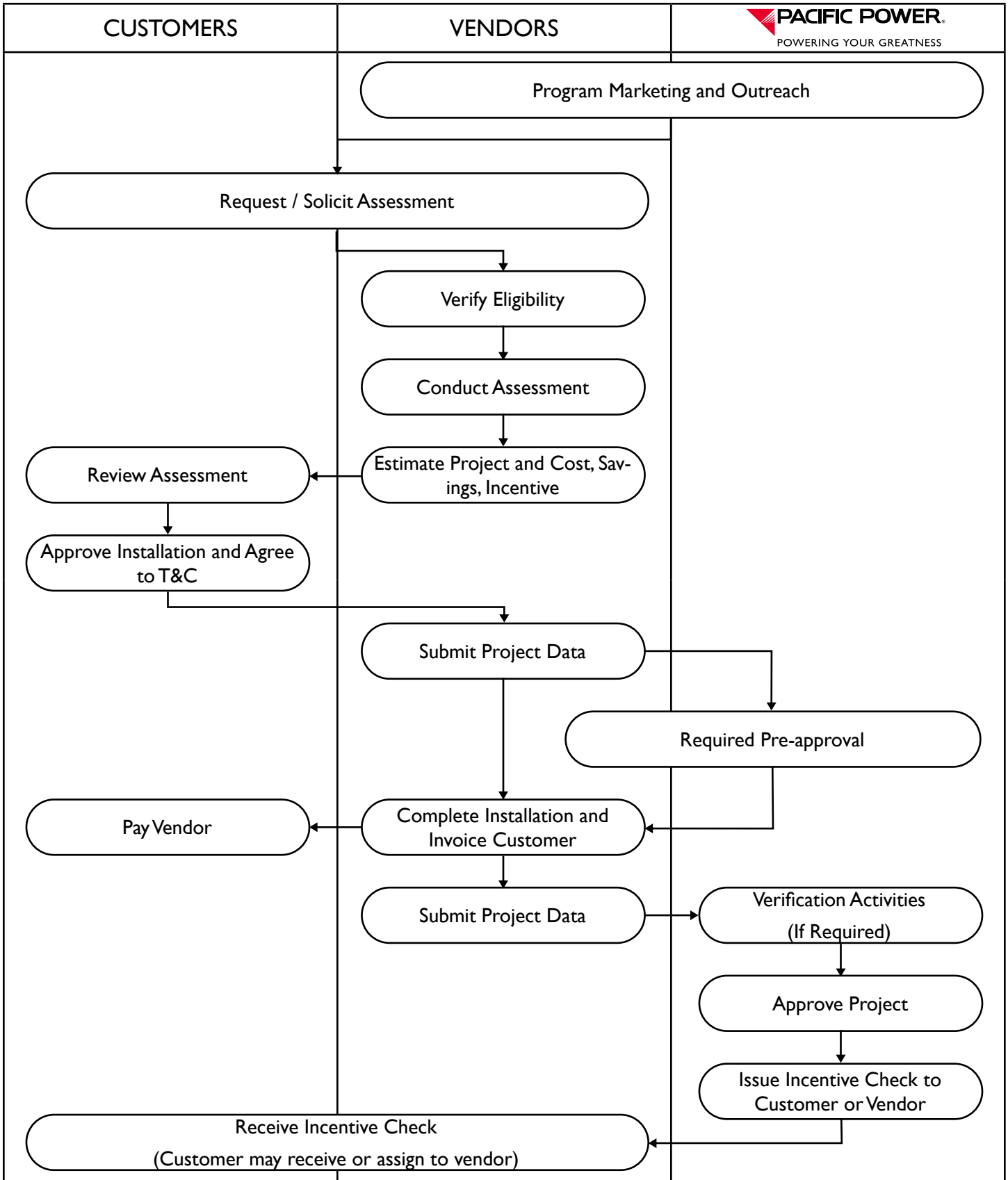
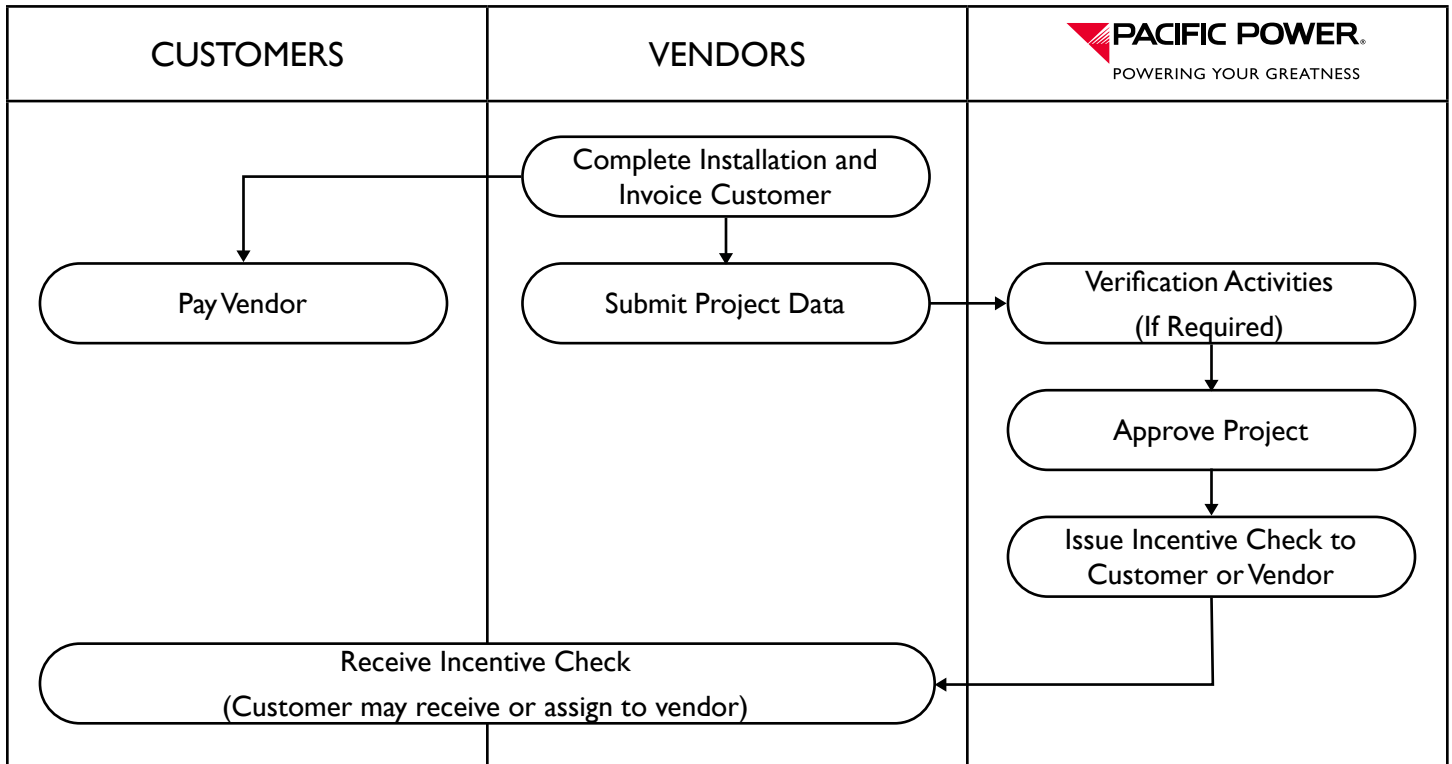


FIGURE 3-3 WATTSMART BUSINESS VENDOR POST-PURCHASE INCENTIVE PROCESS

Incentive Process All Other Typical Measures:  
(except lighting and custom measures as noted above)



### 3.4 PROJECT CHANGES

During the course of a construction project, there are often changes and complications that arise. Make sure to notify coordinator immediately of any changes that materially alter the implementation schedule, the measure or equipment costs, or the project’s estimated kWh savings. Failure to do so may result in the rejection of project or a lower than anticipated incentive.

### 3.5 PROJECT SUBMISSION FOLLOW-UP

The program will confirm receipt of Vendor submission. It is the Vendor’s responsibility to follow-up with the program to confirm receipt if correspondence is not received.

## SECTION 4 - POLICIES AND GUIDELINES

### 4.1 VENDOR QUESTIONS, CONCERNS, AND ESCALATIONS

Vendors may have questions that are not specifically answered in this handbook or the [Network Requirements](#) or Agreement.

We encourage you to contact your [Outreach Coordinator](#) to work through your questions or concerns. Our outreach staff serves as representatives of the Wattsmart Business program and will be the best resource for you to find solutions. In the event you have a question for program representatives other than your Outreach Coordinator, the following is a high level guideline to follow when seeking additional program support.

1. **Work with your Outreach Coordinator:** Contact your outreach coordinator to discuss questions and concerns relating to the Wattsmart Business program. This can be via phone, in person, or via email. Your Outreach Coordinator can route your inquiry to the appropriate channel and facilitate a response to you in 3-4 business days.
2. **Contact Outreach Supervision in writing:** If further clarification is needed, you may provide a written statement of your concerns to be escalated to an outreach supervisor. You can send this to your Outreach Coordinator directly, or, you may email [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy) to be routed to the appropriate supervisor. You will be provided a written response by the program within 3 business days.
3. **Request a meeting with the Utility:** Some questions involving topics beyond the scope of the Wattsmart Business Vendor Network may necessitate input directly from the Utility. If questions remain after working with the outreach coordinator and supervisor and receiving a written response, you can elevate your concerns by emailing your coordinator or [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy) and requesting a meeting with the Utility.
4. **Written notice to Utility:** You may further concerns with the Utility by providing written notice to [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy). You will be provided a written response by the Utility. If there are any legal disputes with the administrator or Company, then it will go to arbitration.

### 4.2 CODE OF CONDUCT / ETHICS REQUIREMENTS

1. **Build trust with customers and program staff:** Establish and maintain a positive track record of excellent customer service, install high quality energy efficiency projects and equipment, submit accurate and complete incentive applications, and provide rapid response in correcting mistakes.
2. **Advertise honestly:** Adhere to the established marketing and advertising standards and guidelines.
3. **Tell the truth:** Honestly represent the Wattsmart Business Program, Vendor's involvement with the program, and the Program requirements/processes.
4. **Be transparent:** Openly identify the nature, location, and ownership of Vendor business, and clearly disclose all policies, guarantees and procedures that bear on a customer's decision to conduct an energy efficiency project.
5. **Honor promises:** Abide by all requirements, expectations and guidelines indicated in this Vendor Handbook. Correct any mistakes as quickly as possible.
6. **Be responsive:** Address any disputes, concerns, or questions quickly, professionally, and in good faith.
7. **Embody Integrity:** Approach all business dealings, transactions, and commitments with integrity.

### 4.3 HOURS OF OPERATION BEST PRACTICES: FOR LIGHTING PROJECTS

This section describes how to ensure the accurate reflection of lighting usage patterns in the lighting calculator of the lighting project for which they are submitted.

#### On-site Considerations

1. Posted business hours should not be assumed to represent the actual lighting usage patterns. Confirm business hours with the customer representative.
2. Facilities rarely have a single lighting usage schedule for the entire building. Facility occupant(s) with knowledge of the lighting patterns, such as facility, office managers or business owners should be interviewed. Here's a list of sample questions to ask a customer:

- a. Do you have different space types with differing lighting usage patterns?
- b. What controls your lights?
  - i. Manual switches?
  - ii. Occupancy sensors?
  - iii. Time clocks? Schedule?
- c. When do lights typically turn on/off?
  - i. Does this differ depending on:
    1. Day?
    2. Weekend?
    3. Season?
  - ii. Does this include after hours activities (janitorial, other)?
3. The following common space types typically have differing lighting usage patterns:
  - a. Restrooms
  - b. Storage Rooms
  - c. Vaults
  - d. Cold Storage
  - e. Hotel/Motel guest rooms
  - f. 24-hour facilities

Holidays and annual weeks of operation differ by business

#### Lighting Calculator Tool Considerations

1. Spaces within the facility with differing lighting usage patterns should each have a separately defined operating schedule.
2. Fixtures need to be assigned to the correct operating schedules as defined in the lighting tool.
3. For facilities with differing lighting usage patterns depending on seasonal schedule, make sure to define the seasonal schedule using the seasonal schedule tab in the lighting tool and assign the applicable fixtures.

#### 4.4 LIGHTING DESIGN LAYOUTS

Wattsmart Business Vendors who participate in the typical lighting program are evaluated on the quality of their projects. One criterion to evaluate project quality is whether a lighting design layout has been submitted with the lighting tool and application when obtaining project pre-approval. Consideration of lighting design is an indicator of a quality lighting project. A well-designed lighting layout can distribute light well, separate task lighting from ambient lighting and provide good controllability to meet the unique needs of a Wattsmart Business customer.

#### 4.5 QUALIFIED LIGHTING EQUIPMENT POLICY

This policy applies to all lighting incentive eligibility as described in the Lighting Catalog for all projects with a valid Incentive Offer, or lighting incentive application. See the Lighting Catalog for your state to see the current policy.

#### 4.6 PROJECT INSPECTION POLICY

All projects are subject to inspection. Inspection staff will verify that a project has been completed, and that the equipment installed aligns with the information submitted on the incentive application. If errors and discrepancies are found, Vendors may be required to fix errors before an incentive is paid.

Please note that if a project is inspected, both Vendors and customers will need to be available for questions and inspection support. Site visits may be required, where inspectors will be looking at a variety of items as a part of the inspection process. This process may also include verification of items like: invoice amounts, equipment installation totals, and hours of operation.

#### 4.6.1 LIGHTING INSPECTIONS

Note that operating hours, and the resulting energy savings calculations, are subject to inspection for verification and adjustment, if necessary. The Coordinator may use lighting loggers to verify hours of operation at a customer's facility.

#### 4.7 MARKETING GUIDELINES AND STANDARDS

Pacific Power provides Vendors with the opportunity to promote the sale and installation of energy efficiency. Vendors promote the availability of incentives from the Wattsmart Business Program to customers who wish to upgrade their building or equipment. Guidelines and requirements for marketing the Program can be found in [Appendix E](#).

For additional questions regarding logos, fonts and appropriate styles, contact your coordinator.

## SECTION 5 - VENDOR NON-COMPLIANCE

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### 5.1 VENDOR REVIEW

Becoming a Wattsmart Business Vendor Network member is a distinction which is only allowed to those Vendors willing to adhere to Pacific Power's values, policies, and requirements. Vendors shall meet the Program service expectations which include, but are not limited to (i) commitment to servicing customers and promoting the Program positively, (ii) customer satisfaction and education, (iii) accurate and timely project documentation submissions, (iv) performing quality workmanship, (v) providing a safe work environment, and (vi) conducting business in an honest and ethical manner and in accordance with all applicable laws and Program requirements.

Vendors will be reviewed periodically for compliance with the Network and Program requirements. If, at any time, Program staff determine or suspect that a Vendor has violated a requirement as specified in the Network Requirements or Vendor Handbook or failed to comply with any Program requirements, the Vendor may be required to complete a correction action process, and may be put in evaluation status. Certain violations or repeated poor performance may result in a Vendor's removal from the Network and termination of the Vendors' Wattsmart Business Vendor Agreement.

Please refer to the Pacific Power Wattsmart Business Vendor [Network Requirements](#) for a complete breakdown of Vendor requirements.



## SECTION 6 - APPENDIX A

### 6.1 HELPFUL LINKS

- Program Website: [www.BeWattsmart.com](http://www.BeWattsmart.com)
- Vendor Network Portal: [Vendor Portal](#)
- [Network Requirements](#)
- [Find a Vendor Search Tool](#)

## SECTION 7 - APPENDIX B

### 7.1 VENDOR APPLICATION AGREEMENT

Utility requires those interested in becoming a Wattsmart Business Vendor to read, sign, and adhere to the Wattsmart Business Vendor Application Agreement included in the Wattsmart Business Vendor Network Application available when [joining](#) the network. See below for a copy of the agreement:

#### PACIFIC POWER WATTSMART BUSINESS VENDOR APPLICATION AGREEMENT

Pacific Power ("Utility") makes available the Wattsmart Business Vendor Network ("Network") for qualifying participants ("Wattsmart Business Vendors") to promote Utility's Wattsmart Business Program ("Program") to Utility's customers. The Program provides incentives to eligible commercial and industrial customers to encourage the sale and installation of energy efficient equipment in non-residential facilities receiving electric service from Utility on qualifying rate schedules in California and Washington. This Wattsmart Business Vendor Application Agreement ("Agreement") sets forth the terms and conditions for Vendors approved to participate in the Network and provide services to customers participating in the Program. By signing below, the Vendor named in the Application is agreeing to comply with and be bound by these terms.

As an approved Wattsmart Business Vendor, the Wattsmart Business Vendor will provide the following services to eligible Utility customers:

- Support and assistance in the identification of energy efficiency opportunities available to customers within the Program; and
- Distribution of Program approved marketing materials, adherence to marketing guidelines and assistance in completing Program related documents as provided by Utility or Program Administrator and available on Utility's website.

If approved, Wattsmart Business Vendor is eligible to receive the benefits described in the Wattsmart Business Vendor Network Requirements and Vendor Handbook which include: promotion of company information on the Utility's website, access to marketing materials and support, program training opportunities, and access to program calculators.

**Program Administrator:** Utility has contracted Evergreen Consulting Group I, LLC ("Evergreen" or "Program Administrator") to act as the Program Administrator and authorizes Evergreen to administer the Network and Program including such activities, but not limited to review, processing, and approval of customer and Wattsmart Business Vendor's applications; qualifying and training of Wattsmart Business Vendors, pre- and post-inspections of customer facilities and project information requests from customer; measurement and verification activities; and issuing incentive checks.

**Wattsmart Business Vendor Network Requirements:** This Agreement incorporates by reference the Wattsmart Business Vendor Network Requirements ("Network Requirements") located [here](#). The Network Requirements set forth additional terms governing a Wattsmart Business Vendor's participation in the Network including, but not limited to, limiting the liability of Utility and Evergreen, a waiver of jury trial, and terms establishing the laws that govern this Agreement.

**Wattsmart Business Vendor Handbook:** This Agreement incorporates by reference the Wattsmart Business Vendor Handbook located [here](#). Wattsmart Business Vendor acknowledges and agrees that the Vendor Handbook, incorporated herein by reference, provides additional responsibilities of the Wattsmart Business Vendor including, but not limited to, the eligible rate schedules, customer participation process, verifying customer and equipment eligibility, program expectations, project submission requirements and inspection policies.

**Term:** This Agreement is effective on the date stated in the approval notice to the Wattsmart Business Vendor unless terminated earlier in compliance with the Wattsmart Business Vendor Network Requirements and remains in effect. Program Administrator will review Wattsmart Business Vendor's status in the Network on a periodic basis for compliance with the Network Requirements and Vendor Handbook. Failure to comply with Participation Requirements may be grounds for termination.

**Entire Agreement:** The terms and conditions set forth herein, including all attachments and incorporated references, constitute the entire understanding between the parties with respect to the subject matter of this Agreement and supersede all other agreements, communications, or understandings, whether written or oral.

I certify that I am an authorized representative of the Applicant and have authority to bind the Applicant to this Network Agreement.

I have read, understand, and agree to be bound by and comply with the terms set forth herein, including the Network Requirements and the Vendor Handbook.


The information provided as part of the Wattsmart Business Vendor Network Application is accurate and complete and I will notify Program Administrator immediately of any changes to the information.

By typing my name in the field below, I understand and agree to sign this form electronically and that my electronic signature is the legal equivalent of my handwritten signature.

## SECTION 8 - APPENDIX C

### 8.1 SAMPLE INVOICE

# INVOICE



<b>DATE</b>	<b>INVOICE NO</b>	ABC Electric Company
10-11-2023	5678	PO box 123
		Yakima, WA 98909
		555-123-4567

ABC Retrofit  
123 St.  
Yakima, WA 98909

ACCOUNT	PO NUMBER	LOCATION	TERMS	INVOICE DATE	PAGE
ABCCorp	91011		Net 30	10/11/2023	1

QUANTITY	DESCRIPTION	UNIT PRICE	EXTENDED
1	<b>Materials</b>	<b>\$17,808.00</b>	<b>\$17,808.00</b>
1.00	<b>Labor</b>	<b>\$12,412.00</b>	<b>\$12,412.00</b>
1	<b>Dump &amp; Lift</b>	<b>\$1,450.00</b>	<b>\$1,450.00</b>
-1	<b>Pacific Power Incentive</b>	<b>\$18,906.54</b>	<b>\$-18,906.54</b>

Subtotal	12,763.46
Sales Tax	2,628.61
Total	<b>15,392.07</b>

MATERIAL	LABOR	OTHER	TOTAL PROJECT COST
\$17,808.00	\$12,412.00	\$1,450.00	\$31,670.00

Thank you for your business

## SECTION 9 - APPENDIX D

### 9.1 MARKETING GUIDELINES

The Pacific Power Wattsmart Business Vendor Network (Network) provides our valued Wattsmart Business Vendors (Vendors) the opportunity to promote the Wattsmart Business program at commercial and industrial Pacific Power customer sites. Vendors are encouraged to promote the sale and installation of energy-efficient equipment to customers who wish to upgrade their building or equipment.

To help Vendors in the sales process, the Network offers a variety of marketing support based on Vendor status in the Network and participation in Wattsmart Business.

#### NETWORK STATUS

Standard Wattsmart Business Vendor: *Approved for the Network, listed on the Find-A-Vendor search tool.*

Premium Wattsmart Business Vendor: *Approved for the Network, has earned the Premium Vendor designation for at least one quarter during the last 12 months.*

Specialty Wattsmart Business Vendor: *Approved for the Network and additionally approved and listed to offer specialty programs such as Lighting Instant Incentives, HVAC Instant Incentives, and HVAC Check-Up.*

#### THE ONLINE MARKETING TOOLKIT

Wattsmart Business offers the online Marketing Toolkit (Toolkit) as a resource for Vendors to streamline and expedite Vendor’s marketing requests, including ordering, downloading, and customizing program marketing materials. Only approved and listed Wattsmart Business Vendors have access to the toolkit, which is granted via an email invitation that includes personalized username and passwords. If you require assistance please contact [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy).

Requests for marketing materials not available in the toolkit will be considered for Premium and Specialty Vendors only, with the exception of using the Wattsmart Business Vendor logo or pre-approved language.

#### MARKETING RESOURCES

	Standard Vendor	Specialty Vendor	Premium Vendor
Premium content in the online Toolkit			X
Utility marketing promotion*		X	X
Customized email signatures		X	X
Custom marketing requests not available in the online Toolkit, request form (hyperlink)		X	X
Use of the Wattsmart Business Vendor logo – see below for guidelines	X	X	X
Customized cobranded program brochures in the online Toolkit	X	X	X
Utility program and incentive brochures in the online Toolkit	X	X	X
Pre-approved program language – see below for guidelines	X	X	X

\*Utility may include promotion of Premium Vendors in customer marketing campaigns and communications.

## SECTION 10 - APPENDIX E

### 10.1 MARKETING GUIDELINES

#### BRAND GUIDELINES

All Vendors are required to adhere to the following brand usage guidelines for any marketing materials developed outside of the online Toolkit. These guidelines have been developed to ensure that Pacific Power and associated brands are protected regarding the use of any marketing efforts. Guidelines for marketing Wattsmart Business include<sup>1</sup>:

- **Pacific Power brand** – Vendors shall not use Pacific Power's or PacifiCorp's corporate name, trademark, trade name, logo, identity or any affiliation for any reason (except as noted below), including soliciting customers, without Pacific Power's prior written consent. This shall apply to, but not be limited to: seller proposal forms, envelopes, business cards, vehicle panels, telephone directories (including white pages, yellow pages and business and online directories), trade publications, advertising (including newspaper, radio, television, billboards, online, etc.), door-to-door flyers, clothing, briefcases, clipboards, promotional items or materials (print or online), or mailings.
- **Wattsmart Business Vendor logo & Premium Vendor logo** – Only approved Vendors who are in good standing will be authorized to use the Wattsmart Business Vendor logo and/or Premium Vendor logo (only available to Premium Vendors). Vendors may obtain the logo through a written email request to: [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy). Approval may take up to 10 business days to complete. Written approval is required prior to the use of the Wattsmart Business Vendor logo.
- **Pre-approved language** – Only approved Vendors who are in good standing may include the following pre-approved Wattsmart Business program copy (text only) in public promotional materials (Quotation marks not required, and text listed in brackets [ ] is optional, at discretion of the individual Wattsmart Business Vendor):
  - "Take advantage of incentives from Pacific Power when you install qualifying high-efficiency [lighting, HVAC, etc.] equipment"
  - "Incentives available from Pacific Power for qualifying [lighting, HVAC, etc.] equipment"
  - "[Vendor name], a participating Vendor in Pacific Power's Wattsmart<sup>®</sup> Business program"
  - "[Vendor name], a Wattsmart<sup>®</sup> Business [lighting, HVAC, etc.] Vendor"
  - "Take advantage of incentives from Pacific Power when you install new [lighting, HVAC, etc.] equipment"
- **Website usage** - If an approved Vendor uses the above pre-approved language or Wattsmart Business Vendor logo on their website, the page(s) that include the pre-approved language or logo must include a hyperlink to [BeWattsmart.com](http://BeWattsmart.com).
- **Other brand usage** - Any requests for brand usage other than the pre-approved Wattsmart Business Vendor logo or language is considered a custom marketing request. Custom marketing requests will only be considered for Premium and/or Specialty Vendors. Custom requests must be made by emailing [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy). Please allow a minimum of 10 business days for review and written response.

For questions relating to marketing materials guidelines, or for support in development of marketing materials relating to Wattsmart Business, please contact us:

Email: [wattsmartbusiness@evergreen.energy](mailto:wattsmartbusiness@evergreen.energy)  
Phone: 509-210-5011

*1. These guidelines are intended to facilitate activity that is covered by the Wattsmart Business Vendor Network agreement, but this document does not replace or supersede the agreement.*