



The Small Business Savings Program makes it easy for small and medium businesses to lower their monthly energy costs by offering no-cost energy-saving products, as well as rebates for qualifying, energy-efficient upgrades. With convenient access to contractors and financing options, the Small Business Savings Program has everything small and medium businesses need to help save energy and money.

ABOUT THIS APPLICATION

The Small Business Savings Program offers rebates on a variety of energy-efficient natural gas equipment for small and medium businesses. These energy-saving upgrades can help your business reduce energy costs and improve your bottom line.

This document contains all program requirements, qualified equipment requirements, terms and conditions, and will serve as your guide through the application process.

WHO IS ELIGIBLE?

Small and medium SoCalGas business customers in San Bernardino and Riverside counties with an annual natural gas usage up to 50,000 therms. See next page for additional eligibility requirements.

LOOKING FOR A CONTRACTOR?

The Small Business Savings Program has a group of participating contractors serving San Bernardino and Riverside counties available to help your business install eligible energy-saving upgrades. Choose your own, or to find a participating contractor, visit SmallBusinessSavings.com/Find-A-Contractor.

FOR MORE INFORMATION OR TO SEE IF YOU ARE ELIGIBLE

Call us at **1-833-609-5183** or email us at SmallBusinessSavings@franklinenergy.com.



Franklin Energy is a SoCalGas authorized contractor responsible for implementing this program through December 31, 2023.

The Small Business Savings Program is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) under the auspices of the California Public Utilities Commission, through a contract awarded to Franklin Energy. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. Customers who choose to participate in this program are not obligated to purchase any additional goods or services offered by Franklin Energy or any other third party. The selection, purchase, and ownership of goods and/or services are the sole responsibility of customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. SoCalGas does not endorse, qualify, or guarantee the work of Franklin Energy or any other third party.** Eligibility requirements apply; see the program conditions for details.

PROGRAM REQUIREMENTS

GENERAL

- The Small Business Savings Program is open to small and medium SoCalGas business customers in San Bernardino and Riverside counties with an annual natural gas usage up to 50,000 therms.
- Customers must have an active SoCalGas account and a minimum of 12 months of billing history to participate.
- The total rebate amount cannot exceed the cost of purchasing and professionally installing your equipment/product.

ELIGIBILITY

- Equipment must meet the requirements of the program as outlined in this application. The program reserves the right to verify installation and deny payment for products that do not meet the requirements of the program.
- Eligible equipment must be new natural gas equipment and should replace existing equipment. Used or rebuilt equipment is not eligible. Fuel switching (changing from electricity to natural gas) equipment does not qualify.
- Qualified SoCalGas account(s) must be fully active and non-delinquent. Equipment must be paid in full, installed, and in use at the time or prior to application submittal. Account verification may be required.
- Qualified equipment must be installed at the facility served by the SoCalGas account listed on the application and must be installed and operational according to state local building codes, ordinances, and/or manufacturer's requirements.
- To verify equipment eligibility, you may contact a Small Business Savings Program representative at **SmallBusinessSavings@franklinenergy.com** or 1-833-609-5183.

PROGRAM LIMITATIONS

- Replacements of equipment types at the site/premise that have received a rebate from SoCalGas within the last five (5) years are not eligible for a rebate.
- Customers who have received rebates, incentives or services for the same equipment from other utilities, states or local programs funded by the Public Purpose Program Surcharge (PPPS) are not eligible. However, customers can apply for rebates from water agencies if the equipment qualifies for one. Contact your local water agency for more information.

USING A LICENSED CONTRACTOR

- All contractors installing rebate-eligible equipment for the Small Business Savings Program must hold and maintain certifications, licenses, insurance coverage, and obtain all legally required building permits as required by local jurisdictions.
- Contractors must install equipment meeting or exceeding specifications.

ENERGY-EFFICIENCY FINANCING

Financing options may be available to make upgrading the equipment in your business more affordable. To learn more, visit **SmallBusinessSavings.com/Financing**.

REBATE PAYMENT

- A rebate check for qualified equipment is generally mailed 45 business days after the program approves a correctly and fully completed application along with the required documentation.
- Please note that additional time may be required if your application is selected at random for inspection.
- The precise rebate amount may be subject to subsequent adjustment by the program.

QUALIFIED EQUIPMENT

- Refer to each section for qualifying equipment requirements.
- Equipment purchased through the Midstream Program via participating distributors is not eligible to receive additional rebates.
- Please refer to the following for specification abbreviations throughout this application: Combustion Efficiency (CE), Energy Factor (EF), Uniform Energy Factor (UEF), or Thermal Efficiency (TE).

BOILERS & WATER HEATING EQUIPMENT

- Before you purchase any water heating equipment, carefully review the specifications listed on pages 3 and 4 for size, input rating, and efficiency requirements.
- For a list of qualifying products, please visit SmallBusinessSavings.com/Rebates.

COMMERCIAL HOT WATER BOILERS

- Hot water boilers must have a defined operational efficiency value.
- "Up To" efficiency values are not acceptable.

TYPE OF BOILER	BOILER RATING	REQUIRED EFFICIENCY	REBATE AMOUNT
Small/Medium - Tier I	≤200 MBtuh	≥0.84 and <0.87 UEF	\$1/MBtuh
Small/Medium - Tier II	≤200 MBtuh	≥0.87 UEF	\$2/MBtuh
Large - Tier I	>200 MBtuh	≥84% and <90% TE	\$1.50/MBtuh
Large - Tier II	>200 MBtuh	≥90% and <96% TE	\$3/MBtuh
Large - Tier III	>200 MBtuh	≥96% TE	\$4.50/MBtuh

POOL HEATERS

- Pool heaters must have an "on/off" switch and have no pilot light.

EQUIPMENT	REQUIRED EFFICIENCY	REBATE AMOUNT
Pool Heater	≥87% TE	\$3/MBtuh

PROCESS HEATING BOILERS

- A flue gas analysis (FGA) measured under full-load conditions is required to document combustion efficiency under full-load conditions after the installation is complete.
- SoCalGas offers FGAs at no cost; please call 1-800-427-2000 to set up an appointment.

TYPE OF BOILER	INPUT RATING	REQUIRED EFFICIENCY	REBATE AMOUNT
Steam	≤20 MMBtuh	≥83% CE	\$4.25/MBtuh
Hot Water - Tier I	≤20 MMBtuh	≥85% and <90% CE	\$2.75/MBtuh
Hot Water - Tier II	≤20 MMBtuh	≥90% CE	\$4/MBtuh

WATER HEATERS

- Water heaters or hot water boilers used for space conditioning, industrial (process) end-use applications, pools, or spas are not eligible.
- Replacement of existing boilers with water heaters are ineligible.
- Water heaters must meet the definition of a water heater, as defined by the California Energy Commission:
 - Storage Water Heaters must be primarily used for domestic hot water
 - Tankless Water Heaters must have an input rating of at least 4,000 Btu per hour per gallon of stored water
 - *Tankless Water Heaters installed in only hotels, hospitals, nursing homes, or groceries have a rebate amount of \$9/MBtuh.

TYPE OF WATER HEATER	WATER HEATER RATING	REQUIRED EFFICIENCY	REBATE AMOUNT
Storage - Small - Tier I	≤75 MBtuh and Medium Draw	≥0.64 UEF	\$2/MBtuh
Storage - Small - Tier II	≤75 MBtuh and High Draw	≥0.68 UEF	\$3/MBtuh
Storage - Large - Tier I	>75 MBtuh	≥83% and <90% TE	\$2/MBtuh
Storage - Large - Tier II	>75 MBtuh	≥90% and <96% TE	\$4/MBtuh
Storage - Large - Tier III	>75 MBtuh	≥96% TE	\$6/MBtuh
Tankless - Small - Tier I	≤200 MBtuh	≥0.81 and <0.87 UEF	\$5/MBtuh
Tankless - Small - Tier II	≤200 MBtuh	≥0.87 UEF	*\$7/MBtuh
Tankless - Medium - Tier II	≥76 and ≤200 MBtuh	≥90% TE	*\$7/MBtuh
Tankless - Large - Tier I	>200 MBtuh	≥80% and <90% TE	\$4/MBtuh
Tankless - Large - Tier II	>200 MBtuh	≥90% and <96% TE	*\$6/MBtuh
Tankless - Large - Tier III	>200 MBtuh	≥96% TE	*\$6/MBtuh

STEAM BOILER STACK ECONOMIZER

- These rebates are applicable to **steam boilers only**.
- The economizer manufacturer, model and spec sheet should be submitted for verification.
- This measure cannot be combined with a space heating boiler incentive.
- Boiler must be natural gas fired.

TYPE OF BOILER	INPUT RATING	REBATE AMOUNT
Feedwater (Single-Stage) Boiler Stack Economizer	≤20 MMBtuh	\$1.75/MBtuh
Condensing (Dual-Stage) Boiler Stack Economizer	≤20 MMBtuh	\$4/MBtuh

SPACE-HEATING BOILERS

- Equipment must be used for space heating to provide human comfort, as defined by CEC Titles 20 and 24 Standards.
- Ambient/natural draft type boilers do not qualify.

TYPE OF BOILER	INPUT RATING	REQUIRED EFFICIENCY	REBATE AMOUNT
Medium Hot Water - Tier 1	300-2500 MBtuh	≥85% and <94% TE	\$3/MBtuh
Medium Hot Water - Tier 2	300-2500 MBtuh	≥94% TE	\$6/MBtuh
Large Hot Water - Tier 1	>2500 MBtuh	≥83% and <94% TE	\$3/MBtuh
Large Hot Water - Tier 2	>2500 MBtuh	≥94% TE	\$4/MBtuh
Medium Steam	300-2500 MBtuh	≥82% TE	\$6/MBtuh
Large Steam - Tier 1	>2500 MBtuh	≥80% and <82% TE	\$1/MBtuh
Large Steam - Tier 2	>2500 MBtuh	≥82% TE	\$2/MBtuh

HEAT RECOVERY EQUIPMENT

HEAT RECOVERY ROOFTOP UNIT (HR-RTU)

- Only fast food restaurant venues with rooftop air conditioner units and a natural gas water heating systems are eligible.
- This applies to the installation of air-to-water roof top air conditioner units that can utilize waste heat to preheat incoming water from the main inlet.

EQUIPMENT	MINIMUM COOLING CAPACITY	REBATE AMOUNT
HR-RTU	10 Ton	\$3,000/Unit

STEAM TRAPS

- Steam traps must replace, on a one-for-one basis, existing steam traps that leak steam by being failed open or in blow-by condition. Failed closed traps do not qualify.
- Customer may be asked to verify the location of the replaced steam trap(s) in the steam loop.
- Steam must be generated from natural gas-fired equipment.

EQUIPMENT	FACILITY HOURS OF OPERATION	REBATE AMOUNT
Steam Trap	≥12 Hours Per Day	\$275/Unit

RECIRCULATING PUMP CONTROL

- Only the following commercial building types are eligible: hotel, motel, nursing home, education university dormitory.
- Recirculating pump must utilize a temperature sensor to monitor a 20-degree difference between the return water temperature and the supply water temperature within the served loop.
- Recirculating pump control must respond to demand by controlling the hot water recirculation loop temperature.
- Domestic water must be heated by natural gas-fired equipment.
- New construction projects are not eligible.

EQUIPMENT	FACILITY HOURS OF OPERATION	BUSINESS SIZE	REBATE AMOUNT
Recirculating Pump Control	24 Hours Per Day, Required	≥25 Units	\$15 Per Dwelling Unit Served By A Loop

LAUNDRY EQUIPMENT

NATURAL GAS MODULATING CONTROLLER

- Only unmodified natural gas commercial dryers are eligible.
- Dryers must have a drum capacity of 30-200 lb.
- Only general commercial facilities, hotels, motels, and nursing homes are eligible. Coin-operated laundry facilities are not eligible.
- To view a list of qualifying products, please visit SmallBusinessSavings.com/Rebates.

EQUIPMENT	DRUM CAPACITY	REBATE AMOUNT
Natural Gas Modulating Controller	≥30 Pounds and ≤200 Pounds	\$850 Per Kit Unit

INSULATION EQUIPMENT

PIPE/FITTINGS INSULATION

- Insulation required by California Building Code (Title 24) or employee safety laws (Occupational Safety and Health Administration 1910.261+.262) is not eligible for a rebate.
- Replacement of damaged (existing) insulation is not eligible for a rebate.
- Pipe and fitting insulation are eligible, including but not limited to: elbows, tees, valves, unions, flanges, reducers, bushings and couplings.
- Minimum qualifying pipe diameter must be at least one-half inch.
- Insulation must be applied at the installation site.
- A minimum of one inch of pipe insulation must be added to existing bare commercial or industrial steel or copper pipe.
- Hours of operation must be indicated on the top of the application. Indicate indoor or outdoor installation of insulation.
- Pipes must transfer hot water, low-pressure or high-pressure steam directly from gas-fired equipment.
- Acceptable types of insulation for hot water pipes include, but not limited to, elastomeric foam rubber, polyethylene foam, UV-resistant polyethylene foam and rigid polyurethane foam.
- Acceptable types of insulation for steam pipes include silicone foam rubber, melamine foam, rigid urethane-based foam, cellular glass, rigid fiberglass, and rigid mineral wool.
- The manufacturer's specification sheet must be submitted with the application.
- Hot water or steam must be generated by natural gas-fired equipment.

TYPE OF PIPE/FITTINGS	PIPE SIZE	REBATE AMOUNT
Hot Water (HW)	≤1 Inch	\$6/Linear Ft. / \$8 Per Fitting
Hot Water (HW)	>1 Inch and ≤4 Inch	\$6.25/Linear Ft. / \$11 Per Fitting
Hot Water (HW)	>4 Inch	\$6.50/Linear Ft. / \$14 Per Fitting
Steam ≤15 PSIG	≤1 Inch	\$6/Linear Ft. / \$12 Per Fitting
Steam ≤15 PSIG	>1 Inch and ≤4 Inch	\$6.25/Linear Ft. / \$20 Per Fitting
Steam ≤15 PSIG	>4 Inch	\$6.50/Linear Ft. / \$40 Per Fitting
Steam ≥15 PSIG	≤1 Inch	\$6/Linear Ft. / \$12 Per Fitting
Steam ≥15 PSIG	>1 Inch and ≤4 Inch	\$6.25/Linear Ft. / \$25 Per Fitting
Steam ≥15 PSIG	>4 Inch	\$6.50/Linear Ft. / \$60 Per Fitting

TANK INSULATION

- One inch or two inches of fiberglass or foam insulation must be added to an existing bare liquid storage or transfer tanks that are coupled to natural gas-fired commercial or industrial equipment that transfers heat to the liquid or solution.
- Insulation of pipe or tank surfaces 140° F or higher located within 7' of the floor, or 15" from a stairway, fixed ladder or ramp are not eligible.
- Liquid must be heated by natural gas-fired equipment.
- Insulation must be applied at the installation site. Insulation required by California Building Code (Title 24) or employee safety laws (OSHA Section 3308) is not eligible for a rebate.
- The manufacturer's specification sheet should be submitted with the application.

INSULATION THICKNESS	TANK TEMPERATURE REQUIREMENT	REBATE AMOUNT
1 Inch	Low-Temperature Application (120-170° F Solution)	\$9.25/Square Ft.
1 Inch	High-Temperature Application (170-200° F Solution)	\$9.25/Square Ft.
2 Inch	Low-Temperature Application (120-170° F Solution)	\$12/Square Ft.
2 Inch	High-Temperature Application (170-200° F Solution)	\$12/Square Ft.

LAMINAR FLOW RESTRICTOR (LFR)

- Only health care facilities that are subject to OSHPD code and regulation are eligible.
- Facility must utilize natural-gas-powered water-heating equipment and include MBtuh rating on page 9 of the application.
- LFRs installed must meet OSHPD code and regulation.
- New construction projects are not eligible.
- LFR models must be labeled as vandal-proof for faucets with the exception of dialysis and scrub sink locations that require an additional adaptor.
- To view a list of qualifying products, please visit SmallBusinessSavings.com/Rebates.

EQUIPMENT	EFFICIENCY REQUIREMENT	REBATE AMOUNT
LFR - Kitchens	≤1 Gallons Per Minute (GPM)	\$7.25/Unit
LFR - Restrooms	≤0.5 Gallons Per Minute (GPM)	\$7.25/Unit

FOOD SERVICE EQUIPMENT

COMMERCIAL COOKING EQUIPMENT

- To view a list of qualifying products, please visit SmallBusinessSavings.com/Rebates.

EQUIPMENT	REQUIRED EFFICIENCY	SIZE	REBATE AMOUNT
Combination Oven	Steam Mode ≥38% and Convection Mode ≥44%	<15 Pans	\$3,000/Oven
		15-28 Pans	\$4,000/Oven
		>28 Pans	\$5,000/Oven
Commercial Conveyor Broiler	See QPL	2 Lane Width (<20")	\$3,000/Unit
		3 Lane Width (20-26")	\$2,500/Unit
		4 Lane Width (>26")	\$3,500/Unit
Commercial Fryer	≥50%	N/A	\$800/Vat
Commercial Griddle	Heavy Load Cooking Energy Efficiency ≥46%	N/A	\$300/Ft.
Commercial Rack Oven	≥51%	Single Rack	\$2,000/Oven
	≥58%	Double Rack	\$2,500/Oven
Commercial Underfired Broiler	See QPL	N/A	\$600/Linear Ft.
Convection Oven	≥51%	(Full Size)	\$500/Oven
Conveyor Oven	≥46%	≥25" Wide	\$775/Oven Deck
Pressureless Steamer*	≥47%	N/A	\$1,800/Compartment

*Some pressureless steamers could also qualify for a water-efficiency rebate. Check with your local water district for details.

COMMERCIAL DISHWASHER FOR BUSINESSES

- Only commercial high-temperature stationary single tank door-type dishwashers are eligible.
- Proof that the appliance meets the gallons per rack (gal/rack) and idle energy rate requirements must be provided.
- Domestic water must be heated by natural gas-fired equipment.
- Used or rebuilt equipment is not eligible.
- Applicable customers include, but are not limited to, casual dining and quick service restaurants, hotels, motels, schools, colleges, and recreational facilities.
- To view a list of qualifying products, please visit SmallBusinessSavings.com/Rebates.

EQUIPMENT TYPE	GALLONS PER RACK (GAL/RACK)	IDLE ENERGY RATE	REBATE AMOUNT
Dishwasher, Single Tank Door Type	<0.76*	≤0.70 kW	\$700/Unit

*Please note that this requirement is more stringent than the ENERGY STAR Tier 2.0 requirement.

LOW-FLOW PRE-RINSE SPRAY VALVE (PRSV) FOR BUSINESSES

- Only commercial-grade PRSVs with flow rates less than or equal to 1.07 GPM are eligible.
- PRSV must comply with 2019 Department of Energy (DOE) regulations.
- PRSVs must be a WaterSense®-labeled product.
- Domestic water must be heated by natural gas-fired equipment.
- Only commercial restaurants, not-for-profit kitchens, hotel kitchens, commissaries, and kitchens in scholastic buildings, government buildings, amusement park locations, churches, hospitals, and prisons are eligible.
- To view a list of qualifying products, please visit **SmallBusinessSavings.com/Rebates**.

EQUIPMENT	EFFICIENCY REQUIREMENT	REBATE AMOUNT
Pre-Rinse Spray Valve (PRSV)	≤1.07 Gallons Per Minute (GPM)	\$22/Unit

SMALL BUSINESS SAVINGS PROGRAM 2021 REBATE APPLICATION CHECKLIST

Please use this checklist to ensure your application is complete and that you have submitted all required documentation.

APPLICATIONS THAT ARE INCOMPLETE OR ARE MISSING DOCUMENTATION WILL NOT BE PROCESSED AND WILL BE RETURNED.

SECTION 1A – CUSTOMER INFORMATION

Did you provide the following?

- SoCalGas account number
- Customer name, as it appears on SoCalGas bill
- Customer address, as it appears on SoCalGas bill
- Contact information
- Check marks on the boxes that apply
- Business name or DBA (If applicable)

SECTION 1B – CONTRACTOR INFORMATION

Did you provide the following?

- Contractor company name
- Contractor CSLB license number and classification
- Contractor tax status
- Contact information

SECTION 2A – REBATE EQUIPMENT INFORMATION

Did you provide the following?

- Installation date (must be before application is signed)
- Manufacturer name, model number and serial number (if applicable)
- Equipment type, quantity, input rating (if applicable), rebate per unit and rebate total (use pages 3-6 for the correct rebate amount.
- Insulation specifications, including whether you purchased it for pipes or tanks, hot water or steam, at which pipe diameter, and insulation thickness
- The rebate total in the indicated box (sum of Tables 1, 2 and 3)

SECTION 2B – HVAC EQUIPMENT INSTALLATION

Did you provide the following?

- For space-heating equipment and other HVAC related installations, contractor must provide permit number and signature

SECTION 3 – PAYEE INFORMATION (PERSON RECEIVING CHECK)

Did you provide the following?

- Rebate assignment (must be signed by customer)
- Mailing address for rebate check
- Payee's name and address and contact information
- Payee tax status and ID number

SECTION 4 – CUSTOMER SIGNATURE

- Applicant's dated signature accepting the terms and conditions

REQUIRED DOCUMENTS

Did you provide/attach the following?

- Copy of the W9 if payee is a third party (e.g. contractor)
- Copy of the paid, itemized invoice that clearly states (1) a zero balance or that it has been paid in full, (2) the equipment, installation and tax costs, and (3) the manufacturer and model of the product

If your invoice is not itemized, please contact your contractor.

WHERE TO SUBMIT

Please make a copy of your completed application form and all required documentation, such as receipts and invoices, for your records. You may submit your completed application, along with required documentation, one of three ways:

1. Mail:

Franklin Energy

Attn: Small Business Savings Program

10722 Arrow Route, Suite 120

Rancho Cucamonga, CA 91730

2. Email: SmallBusinessSavings@franklinenergy.com

3. Online: SmallBusinessSavings.com

For more information, visit **SmallBusinessSavings.com**, email us at **SmallBusinessSavings@franklinenergy.com** or call us at **1-833-609-5183**.

SMALL BUSINESS SAVINGS PROGRAM 2021 REBATE APPLICATION FORM

SECTION 1A – CUSTOMER INFORMATION

SoCalGas Account Number : ---

Business Name :

Business Street Address : City : State : ZIP :

Type of Business (e.g., hotel, fitness center, restaurant, etc.) :

Authorized Representative : Title :

Email : Contact Number :

Other Information (Please Select All That Apply)

- Primary language spoken is other than English Less than 10 employees Leased building

SECTION 1B – CONTRACTOR INFORMATION

Contractor Company Name :

CSLB License # and License Classification (A/B/C) :

Tax Status (Select Only One)

- Corporation Limited Liability Company Partnership
 Sole Proprietorship Tax Exempt Other: _____

Contractor Contact Name :

Telephone : Email :

Address : City : State : ZIP :

SMALL BUSINESS SAVINGS PROGRAM 2021 REBATE APPLICATION FORM

SECTION 2A – REBATE EQUIPMENT INFORMATION

TABLE 1: FOR BOILERS, WATER HEATING, HEAT RECOVERY, LAUNDRY AND/OR FOODSERVICE EQUIPMENT REBATES

Equipment purchased through Midstream Program via participating distributors is not eligible to receive additional rebates.

	Install Date (MM/DD/YY)	Equipment Type	Manufacturer	Model # or Type	Serial #	Equipment Specification	Quantity	Rebate/Unit	Rebate Total (\$)
ex:	01/01/21	Combi Oven	ACME	SCCWE102G	123AE1236	N/A	3	\$1,450/Oven	\$4,350.00
ex:	01/03/21	Griddle	ACME	CGSE601	123EA6321	4 Ft†	5	\$100/Ft	\$2,000.00
ex:	01/06/21	Commercial Boiler	ACME	CBH8-0059	123AE1221	199.9‡	2	\$3/MBtuh	\$1,199.40
ex:	01/14/21	Gas Modulating V.	ACME	OLSKIS152	654JPD14	64 lbs	1	\$850/Unit	\$850.00
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									
TOTAL EQUIPMENT REBATE DUE:									

TABLE 2: INSULATION EQUIPMENT (PIPE/FITTINGS AND/OR TANK INSULATION) REBATES

	Install Date (MM/DD/YY)	Type of Pipe (HW, ≥15PSIG, <15 PSIG)	Pipe Size	Tank Insul. Thickness	Tank Temp.	Manufacturer	Indoor/Outdoor	Ln. Ft., Sq. Ft. or Unit	Evidence of prior tank insulation	Rebate/Unit	Rebate Total (\$)
ex:	01/01/21	<15 PSIG	<1"	N/A	160°	ACME	Indoor	3,238 Ft.	Yes	\$3/Ln. Ft.	\$9,714.00
ex:	01/11/21	N/A	N/A	1"	160°	ACME	Outdoor	823 Sq. Ft.	No	\$3/Sq. Ft.	\$2,469.00
1.											
2.											
3.											
4.											
5.											
TOTAL INSULATION REBATE DUE:											

TABLE 3: LAMINAR FLOW RESTRICTOR (LFR) REBATES

	Install Date (MM/DD/YY)	Manufacturer/Part No.	Flow Rate (GPM)	Water Heating Source	MBtuh Rating	Quantity	Rebate/Unit	Rebate Total (\$)
ex:	01/21/21	Neoperl/1401405	0.5 GPM	Boiler	199.9	100	\$6.50/unit	\$650.00
1.								
2.								
3.								
4.								
TOTAL LFR REBATE DUE:								

GRAND TOTAL REBATE DUE:

† Nominal width per model can be found at caenergywise.com/rebates.

‡ Do not round the MBtuh rating up or down.

SECTION 2B – HVAC EQUIPMENT INSTALLATION

TO BE COMPLETED ONLY FOR APPLICATIONS FOR SPACE-HEATING BOILERS AND OTHER HVAC EQUIPMENT

Pursuant to California Public Utilities Commission (CPUC) Decision (D.) 18-10-008, starting July 1, 2019, all projects involving the installation, modification or maintenance of HVAC measures, and reserving a project incentive of \$3000 or more, must be installed by technicians with one of the following criteria below. **Please indicate below which of the following criteria your installation technician meets.**

- Completed a California or federal accredited HVAC apprenticeship
- Is currently enrolled in a California or federal accredited HVAC apprenticeship
- Completed at least five (5) years of work experience at the journey level as defined by the California Department of Industrial Relations, passed a practical and written HVAC system installation competency test, AND received credentialed training specific to the installation of the technology being installed
- Holds a C-20 HVAC contractor license from the California State Contractor's Licensing Board

I have read and understand the applicable terms and conditions on page 11 of this application. I certify that the information I have provided is true and correct. I certify that the product(s) applied for is/are installed, operational and meet(s) the program and application requirements. I certify that I am a licensed contractor, and have followed applicable permitting requirements for this/these installation(s)/replacement(s).

Contractor Signature : _____ Signature Date : _____ Permit Number : _____

SECTION 3 – PAYEE INFORMATION (PERSON RECEIVING CHECK)

Payee Tax Status (Select Only One):

- Government
- Individual/Sole Proprietorship
- Corporation
- Tax Exempt (Tax exempt, non-profit)
- Partnership
- Other: _____

Payee Tax ID Number: _____

Select Only One Type:

- EIN
- Federal Tax
- SSN

Rebate check will be printed and payable as stated on the W9 form.

Payee Business Name :

Payee Contact Name :

Telephone : _____ Email : _____

Mailing address for rebate check if other than stated on W9 form.

Attention to :

Mailing Address: _____ Unit/Suite Number : _____

City : _____ State : _____ ZIP : _____

IRS Tax Reporting: The Small Business Savings Program will report this payment made to the check recipient on IRS form 1099 as "Other Income" unless the payment is less than \$600, or the payee is identified as a corporation or exempt. The Small Business Savings Program is not responsible for any taxes that may be imposed as a result of this incentive/rebate.

SECTION 4 – CUSTOMER SIGNATURE

TERMS AND CONDITIONS

1. I certify that I am an eligible SoCalGas customer and I have purchased and installed the indicated energy-saving products within 90 days of the date of this application and for use in my business facility and not for resale or otherwise. I can verify equipment was installed and operational on or after January 1, 2022 and on or before December 31, 2022. I have attached documents establishing paid proof of purchase for the items applied for on this rebate form. I understand that incomplete and incorrect applications will not be processed.
2. If requested, I will allow a representative from Franklin Energy, SoCalGas, the California Public Utilities Commission (CPUC), or any authorized third party reasonable access to my property to verify the installed products before a rebate is paid. I understand that a rebate will not be paid if I refuse to participate in any required verification. I understand that a representative from Franklin Energy or other authorized third party may contact the qualifying product vendor and/or installer to verify purchase and/or installation and may provide my name and/or address to complete this verification.
3. I understand that this project may be selected for evaluation studies and/or program measurement by external contractors appointed by the CPUC. These studies are used to analyze and improve program performance. I agree to participate by responding to inquiries from these external contractors.
4. I certify that all of the information on this rebate form is true and correct, including the tax identification number. I understand that rebate payments are based on related energy benefits over the life of the product. Therefore, I agree to maintain the energy-efficient measure specified in the rebate form 100% functional for the life of the product or a period of five (5) years from receipt of rebate funds, whichever is less, and continue to be a customer of SoCalGas during said time period.
5. If the above ceases to be the case, I shall refund a prorated amount of rebate dollars to SoCalGas based on the actual period of time for which I provided the related energy benefits as a customer of SoCalGas. I understand that this program, or individual measures, may be modified or terminated without prior notice.
6. I understand that this rebate form and the paid itemized invoice must be received by the Small Business Savings Program or postmarked no later than January 31, 2023. I acknowledge that I would not have undertaken an energy- efficiency equipment upgrade at this time if SoCalGas had not offered a monetary rebate.
7. If I choose to participate in the On-Bill Financing Program (OBF) offered by SoCalGas to obtain financing for the products listed on this form, I understand that the OBF terms and conditions will control (including, without limitation, the rebate amount for the products listed here) if there is any conflict between this rebate application's terms and conditions and OBF.
8. In no case will the Small Business Savings Program pay more than 100 percent of the actual purchase price of the items to be rebated or the maximum allowance per unit. Purchase price includes materials cost plus installation labor for pipe insulation, fitting insulation, tank insulation, and steam traps. Labor charges apply to contractors only. Customers who self-install may not charge installation labor. Sales taxes are not included in the item's purchase prices.
9. This program has a limited budget. Rebate forms will be accepted on a first-come, first-served basis, until allocated funds are no longer available.
10. I have followed applicable permitting requirements for this installation. I have also used a licensed contractor to install any space-heating boilers and any other equipment.
11. I have not received rebates, incentives or services for the same equipment from other utilities, states or local programs funded by the Public Purpose Program Surcharge (PPPS). However, I understand that water utilities are not funded by the PPPS and I may apply for their rebates.
12. I understand rebates are taxable, if greater than \$600 for business customers, and will be reported to the IRS on Form 1099 unless I have identified myself as a corporation or exempt. I am urged to consult my tax advisor concerning the taxability of rebates. SoCalGas, the Small Business Savings Program or Franklin Energy are not responsible for any taxes that may be imposed on me or my business as a result of receipt of this rebate.
13. The selection, purchase and ownership of equipment are the sole responsibility of the customer. SoCalGas makes no representation as to the safety, reliability and/or efficiency of the equipment. SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of any product installed in connection herewith. To the maximum extent permitted by law, I waive any and all claims against SoCalGas and its affiliates arising out of or in connection with the Small Business Savings Program, including my application for any rebate(s) under this program. I acknowledge and agree that SoCalGas shall not be liable for any type of damages, whether direct, indirect, special, consequential, or punitive, regardless of the form of action.

By signing below, I certify that (a) I have read, understood, and hereby agree to the program requirements and terms and conditions set forth in this rebate application form, (b) I understand and agree that if my business is not named in section 3, I am authorizing the rebate check to go to the third party named and thus will not be receiving a rebate check, (c) I understand and agree that my release of the payment to another party does not exempt me from program requirements, and (d) I meet (and will continue to meet) all eligibility criteria in order to be paid under this program.

Customer Signature :

Customer Name :

Date :

1. MAIL

Please make a copy of these documents for your record before submitting. You may submit your completed application, along with required documentation, one of three ways:

Franklin Energy
Attn: Small Business Savings Program
10722 Arrow Route, Suite 120
Rancho Cucamonga, CA 91730

2. EMAIL

SmallBusinessSavings@franklinenergy.com

3. ONLINE

SmallBusinessSavings.com

IF YOU HAVE ANY QUESTIONS, PLEASE CALL US AT 1-833-609-5183