



CONTRACTOR INFORMATION

Company Name

DBA

Site Address

City

State

Zip Code

If Mailing Address and Site Address are different, include Mailing Address below.

Mailing Address

City

State

Zip Code

Other Office Locations (Only City Names Required)

Number of Sales
Representatives

Annual Sales
Revenue (\$)

Forecasted Annual PACE
Financing Volume (\$)

Business Start Date (Year)

Fed. Tax ID

CSLB License Type

CSLB License #

Expiration Date

Business Type

Sole Proprietorship

S Corporation

Limited Liability Company

C Corporation

Other: _____

Website Address

PRIMARY COMPANY CONTACT (Enrollment-Renewal)

Contact Name

Title

Office Phone

Cell Phone

Fax

Email

SECONDARY COMPANY CONTACT (Enrollment-Renewal)

Contact Name

Title

Office Phone

Cell Phone

Fax

Email

PRIMARY COMPANY CONTACT (Signatory for Completion Certificates)

Contact Name

Email



BUSINESS INFORMATION

Services Offered - Energy Efficiency Products (Check all that apply)

- | | | |
|--|---|--|
| <input type="checkbox"/> HVAC | <input type="checkbox"/> Pool Equipment | <input type="checkbox"/> Solar Water Heating |
| <input type="checkbox"/> Windows & Doors | <input type="checkbox"/> Lighting Fixtures | <input type="checkbox"/> Small Wind Turbines |
| <input type="checkbox"/> Roofing | <input type="checkbox"/> Geothermal Heat Pump | <input type="checkbox"/> Electric Vehicle Charging Station |
| <input type="checkbox"/> Insulation | <input type="checkbox"/> Solar PV | |
| <input type="checkbox"/> Gas or Electric Water Heating | <input type="checkbox"/> Solar Pool Heating | |
| <input type="checkbox"/> Other: _____ | | |

Services Offered - Water Efficiency Products (Check all that apply)

- | | | |
|---|---|--|
| <input type="checkbox"/> Toilets | <input type="checkbox"/> Landscaping / Irrigation Systems | <input type="checkbox"/> Greywater Systems |
| <input type="checkbox"/> Hot Water Delivery Systems | <input type="checkbox"/> Rainwater Catchment Systems | <input type="checkbox"/> Artificial Turf |
| <input type="checkbox"/> Other: _____ | | |

CA County Service Areas (Check all that apply)

- | | | |
|---------------------------------------|--|--|
| <input type="checkbox"/> Alameda | <input type="checkbox"/> Marin | <input type="checkbox"/> San Mateo |
| <input type="checkbox"/> Alpine | <input type="checkbox"/> Mariposa | <input type="checkbox"/> Santa Barbara |
| <input type="checkbox"/> Amador | <input type="checkbox"/> Mendocino | <input type="checkbox"/> Santa Clara |
| <input type="checkbox"/> Butte | <input type="checkbox"/> Merced | <input type="checkbox"/> Santa Cruz |
| <input type="checkbox"/> Calaveras | <input type="checkbox"/> Modoc | <input type="checkbox"/> Shasta |
| <input type="checkbox"/> Colusa | <input type="checkbox"/> Mono | <input type="checkbox"/> Sierra |
| <input type="checkbox"/> Contra Costa | <input type="checkbox"/> Monterey | <input type="checkbox"/> Siskiyou |
| <input type="checkbox"/> Del Norte | <input type="checkbox"/> Napa | <input type="checkbox"/> Solano |
| <input type="checkbox"/> El Dorado | <input type="checkbox"/> Nevada | <input type="checkbox"/> Sonoma |
| <input type="checkbox"/> Fresno | <input type="checkbox"/> Orange | <input type="checkbox"/> Stanislaus |
| <input type="checkbox"/> Glenn | <input type="checkbox"/> Placer | <input type="checkbox"/> Sutter |
| <input type="checkbox"/> Humboldt | <input type="checkbox"/> Plumas | <input type="checkbox"/> Tehama |
| <input type="checkbox"/> Imperial | <input type="checkbox"/> Riverside | <input type="checkbox"/> Trinity |
| <input type="checkbox"/> Inyo | <input type="checkbox"/> Sacramento | <input type="checkbox"/> Tulare |
| <input type="checkbox"/> Kern | <input type="checkbox"/> San Benito | <input type="checkbox"/> Tuolumne |
| <input type="checkbox"/> Kings | <input type="checkbox"/> San Bernardino | <input type="checkbox"/> Ventura |
| <input type="checkbox"/> Lake | <input type="checkbox"/> San Diego | <input type="checkbox"/> Yolo |
| <input type="checkbox"/> Lassen | <input type="checkbox"/> San Francisco | <input type="checkbox"/> Yuba |
| <input type="checkbox"/> Los Angeles | <input type="checkbox"/> San Joaquin | |
| <input type="checkbox"/> Madera | <input type="checkbox"/> San Luis Obispo | |

Languages Spoken by your Sales/Customer Service Staff

- | | | |
|---------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> English | <input type="checkbox"/> Korean | <input type="checkbox"/> Chinese |
| <input type="checkbox"/> Spanish | <input type="checkbox"/> Tagalog | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> Other: _____ | | |



Bank Information for EFT Payments (Electronic Funds Transfer)

Name of Bank

Name on Account

Account #

Routing #

** If bank information is not provided, please allow 3-4 weeks of processing time for payments by check.*

GENERAL LIABILITY INSURANCE

Insurance Company

Policy #

Expiration Date

WORKER'S COMPENSATION INSURANCE

Insurance Company

Policy #

Expiration Date

CONTRACTOR PARTICIPATION AGREEMENT

Introduction

The CaliforniaFIRST Residential PACE Program was created to assist property owners who want to improve the energy and/or water usage of their home or building while lowering utility bills and greenhouse gas emissions. As such, under the CaliforniaFIRST Program (the "Program"), the CaliforniaFIRST Program Sponsor (the "Program Sponsor"), initially the California Statewide Communities Development Authority and the County of Los Angeles, offers this financing for residential property owners. Through the Program, property owners may borrow money to finance the installation of eligible, permanently fixed renewable energy systems, energy efficiency products, and/or water efficiency products on their property ("Eligible Products") and repay the financing through an assessment on their property tax bill. Participation in the Program is voluntary and requires the full consent of the property owner. Property owners sign an assessment contract, and agree to repay the amount financed over a period of 5, 10, 15, 20, or 25 years, depending on the expected useful lifetime of the installed Eligible Products. An assessment lien is recorded on the property to secure the financing.

The Program is administered by Renew Financial ("Program Administrator"). As the Program Administrator, Renew Financial ("Renew Financial") manages the Program Call Center, handles daily activities of the Program, and provides financing that enables the Program.



1. Contractor Eligibility Requirements

To be eligible for the Program, contractors must meet the following requirements to become a participating contractor ("Participating Contractor"):

- A. CSLB License(s)** – Have an active license in good standing with the California Contractors State License Board (CSLB). Contractors may only install Eligible Products for which they have an appropriate CSLB license. All Solar PV and solar thermal systems must be installed by a CSI-registered installer holding appropriate contractor's license.
- B. Business License(s)** – Have a valid business license for any jurisdiction where the contractor will be performing work under the Program.
- C. Insurance Requirements** – Meet the CSLB's bonding and workers compensation insurance requirements and carry General Liability coverage with limits no less than \$1,000,000 per occurrence.
- D. Time in Business** – Provide evidence that they have operated the business for a minimum of one year, installing the equipment, products, or materials indicated on their contractor's license or provide evidence of equivalent experience.
- E. Form W-9** – Sign and submit an IRS form W-9 "Request for Taxpayer Identification Number & Certification."
- F. Contractor Directory** – The Program Administrator will establish a Contractor Directory that lists all Participating Contractors. In order to be listed in the directory, Participating Contractors must attend a Program Orientation (in-person or online). To remain listed in the directory, Participating Contractors must remain in good standing with the CSLB, maintain all licensing and insurance requirements, and submit a minimum of one approved financing application per year. Listing in the directory does not guarantee Participating Contractor any minimum volume of jobs or customers that may be eligible to receive CaliforniaFIRST project financing.
- G. Better Business Bureau (BBB) Rating** – Have a satisfactory BBB rating of "B" or better. If not rated on BBB, other online reputation sites will be reviewed to determine eligibility.
- H. Subcontractor** – The primary Participating Contractor shall ensure that all subcontractors comply with the eligibility, terms, and conditions of this Agreement; have a current license in the specialty for the work being done; and are limited to performing only work for which they are licensed. The Primary Participating Contractor shall remain responsible for all work performed by any subcontractor.

2. Installation

To be eligible for the Program, contractors must meet the following requirements to become a "Participating Contractor":



- A. If required by the jurisdiction, pull permits from the appropriate city or county building department for all Eligible Products;
- B. Obtain approval of proposed Eligible Products in advance by calling the Program or by completing the Custom Product Application process;
- C. Install Eligible Products that meet the required eligibility specifications;
- D. Comply with all applicable law, regulations, ordinances and court orders, whether federal, state, or local in its dealings with consumers, installation of projects, and all other aspects of its performance under the Program.

3. Indemnity

Participating Contractors shall indemnify, defend, and hold harmless the Program Sponsor, purchasers of the bond issued by the Program Sponsor, the Program Administrator, and its designated representatives and its and their respective directors, officers, agents, assigns, successors-in-interest, and employees against any and all claims, losses, damages, expenses, actions, suits, costs, including attorney's fees (which shall include, but are not limited to, allocable costs of in-house counsel), and liabilities, asserted or incurred by any other parties, including, but not limited to, the Program Sponsor, purchasers of the bond issued by the Program Sponsor, the Program Administrator, and its designated representatives' employees and/or Contractor's employees, arising out of or in any way connected with (i) any act or omission of Contractor, its agents, employees, contractors, subcontractors, and/or suppliers, in the performance of the work under this Agreement or the Program, whether intentional or negligent, active or passive, or (ii) Contractor's breach of any provision of this Agreement, excepting only such losses, damages or liability to the extent caused by the sole negligence or willful misconduct of the Program Sponsor, the Program Administrator, and its designated representatives or their employees.

The Program Sponsor, purchasers of bonds issued by the Program Sponsor, the Program Administrator, or its agents, do not endorse contractors who register for the Program, any other persons involved with the installed products, or the design of the products, or warrant the economic value, energy savings, safety, durability, or reliability of the Eligible Products.

4. Program Marketing/Use of CaliforniaFIRST Logo

The Program has provided Branding Guidelines ("Guidelines") for Participating Contractors wishing to reference the CaliforniaFIRST Program in their marketing materials. These guidelines should be strictly adhered to at all times. If there is any doubt regarding compliance, Contractor is urged to submit the marketing communication to the Program administrator prior to ad placement or distribution of marketing collateral. Contractors violating the Guidelines may be suspended or terminated from the program. Guidelines should be strictly adhered to at all times.



5. Right To Inspect Eligible Products Installations

The Program reserves the right to perform an on-site validation visit of any Eligible Products financed by the Program to confirm that the installation is complete and complies with all eligibility requirements. The Program Administrator may follow-up with property owners, such as conducting satisfaction surveys, and based on the results may opt to perform additional site inspections for future customers.

6. Warranty

Participating Contractor shall warrant to all customers it serves under this Agreement that any materials and equipment installed as part of this Program shall be free from original defects in material, workmanship, design, and installation for a minimum period of at least one (1) year from the date of completion of the work and Participating Contractor shall remedy any such defect, at its sole expense and cost, during the warranty period. Participating Contractor shall instruct all of its customers under this Program on system or product operations and maintenance and provide customers with all owner's manuals and warranty documents. Participating Contractor shall provide any other applicable warranties required to obtain rebates or other incentives it represents will be available to property owners for Eligible Projects installed under the Program.

7. Fraud or Dishonesty

Participating Contractor expressly warrants and represents that it shall conduct its business activities without perpetrating any fraud or dishonesty on customers it serves through the Program.

8. Agreement to Property Owner Handbook

Contractor acknowledges and shall comply with all policies and procedures outlined in the current CaliforniaFIRST Program Residential Property Owner Handbook ("Property Owner Handbook") as amended from time to time.

9. Term and Termination

The CaliforniaFIRST Program Administrator can terminate this Agreement with Participating Contractor at its sole convenience and discretion, upon written notice to the Contractor. The Agreement may be terminated for any violation or failure of Participating Contractor to comply with the terms of this Agreement. In the event of termination, Participating Contractor agrees to waive any and all claims for damages, direct or otherwise, arising under any theory of law, against the Program Sponsor, purchases of bonds issues by the Program Sponsor, the Program Administrator, and its representatives, including but not limited to loss of anticipated profits, resulting from contract termination.

While it is impossible to note every type of violation or unacceptable conduct that could lead to termination, such violations may include:

- A. Installing equipment or materials that endanger the safety of customers;



- B. Failure to comply with any of the terms and conditions of this Agreement or the Program processes;
- C. Misrepresenting Contractor's relationship with Program Sponsor or Renew Financial, either directly or through erroneous or misleading advertising, marketing, or other promotional materials;
- D. Providing false information and/or engaging in acts of intimidation, harassment, or retaliation against any customer;
- E. Failing to repair damage to a customer's property resulting from an installation or other Contractor action or inaction arising under or related to the Program.

Participating Contractor may discontinue participation in this Program by providing thirty (30) days' written notice to the Program Administrator or its designated representatives.

Acknowledgement

I certify that all the information included herein and the accompanying documentation is true and correct and that I am authorized to sign this Agreement for the company which I represent. I have read, understand, and agree to the terms and conditions set forth in this Contractor Participation Agreement and the Program guidelines described in the Property Owner Handbook. I consent to any inquiry appropriate and necessary to verify or confirm the information I have provided to the Program Administrator.

Name

Authorized Representative (print name)

Title

Authorized Representative Signature

Date

Return this completed and signed form along with copies of all the required documentation by mail, fax or email to:

CaliforniaFIRST
3800 Watt Ave., Suite 105
Sacramento, CA 95821

Fax: 800-506-9073
Email: californiafirst@egia.org

For questions or to check application status: 877-592-2061

Required Documentation

- Signed W-9 Form
- Proof of General Liability Insurance
- Proof of Workers Compensation Insurance

How were you referred or recruited to CaliforniaFIRST?

- EGIA
- Clean Power Finance
- EnACT
- CaliforniaFIRST Regional Sales Manager
Name: _____
- Colleague or Business Associate
Name: _____
- Other: _____