

# At-A-Glance Eligibility Checklist

If your project meets these criteria, help your customer apply with an SBF finance company! The finance company will check and approve the customer's credit, review the project and give the go-ahead to proceed with installation.



## CUSTOMER

- A for-profit or non-profit business that meets one of the following:
  - 100 or fewer employees
  - Annual revenues less than \$15 million
  - SBA size standard requirement for the customer's industry

## PROPERTY

- Must be used for business activities
- An IOU (PG&E, SoCalGas, SCE or SDG&E) bills the property for gas and/or electric service
  - Customers may receive service from a Community Choice Aggregator (CCA) or Energy Service Provider (ESP) as long as there is a bill from an IOU.*

## ENERGY SAVING MEASURES (ESMs)

- Each measure must qualify using one of the following methods:
  - Included on Pre-qualified ESM list
  - IOU Custom-approved measure
  - Professionally certified measure
- Must save energy corresponding to the fuel provided by an investor-owned utility (IOU)
- Must be installed by a Participating Contractor, unless self-install eligible per the Pre-qualified ESM list

## PROJECT

- Energy efficiency retrofit projects (includes DR) consisting of at least one ESM
  - Project can contain non-energy measures or DG, though the finance company will determine amount allowed*
- Total cost for non-lighting ESMs installed utilizing the Pre-qualified ESM List does not exceed \$350,000
- Contractor is enrolled in the Program prior to completing their scope of work

Projects up to \$5MM may be financed. Credit enhanced financing is available on projects up to \$1MM with at least 70% ESMs and no more than 30% non-ESMs. Additional non-ESMs or distributed generation such as solar PV may also be included; contact a finance company for terms.

**For more information: [www.GoGreenFinancing.com](http://www.GoGreenFinancing.com)**