



## CUSTOM APPLICATION FOR BUSINESS CUSTOMERS

### Instructions for Use:

*For complete instructions, please refer to the Terms and Conditions on page 4.*

**Step 1: Submit Completed Application for Approval:** Written approval (notice to proceed) must be obtained by the City of Portland before purchase or installation of new equipment or systems. **The following checklist will help you identify needed information to ensure quick analysis and approval of your application.** Direct inquiries to 877-NRG-SAV1 (877-674-7281).

- Describe the project in one-to-two paragraphs
- List all known factors, assumptions and issues in any calculations you provide for kW and kWh energy savings.
- Provide clear and logical step-by-step calculations detailing the estimated energy savings.
- Show all units in the calculations
- Provide a copy of the vendor proposal showing pricing detail.
- Spreadsheets are accepted and encouraged; however, state calculation methodologies separately and clearly.

**Step 2: Determine Eligibility:** Equipment must be new and proposed to be installed in a facility which is a City of Portland electric customer.

**Step 3: Install Equipment.** New equipment must be installed and old equipment removed within 120 days of incentive approval.

**Step 4: Attach the following documentation with your completion form:**

- Itemized invoices including costs for equipment installed and installation labor.
- New equipment specification sheet(s)

**Step 5: Mail completed paperwork to: Portland Energy Smart Program<sup>SM</sup>**

1219 Turner Street  
Lansing, MI 48906





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Customer Information (Please Print)				
Name of Business		Phone	Email Address	
Mailing Address		City	State MI	ZIP Code
Installation Address		City	State MI	ZIP Code
Utility Account Number		Hours of Operation:	Is this a 24-hour facility? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Building Use - Please Check One: <input type="checkbox"/> Office <input type="checkbox"/> Retail <input type="checkbox"/> Warehouse <input type="checkbox"/> Restaurant <input type="checkbox"/> Grocery/Supermarket <input type="checkbox"/> Manufacturing <input type="checkbox"/> Lodging School: <input type="checkbox"/> Elementary/Secondary <input type="checkbox"/> College <input type="checkbox"/> Hospital Healthcare: <input type="checkbox"/> Clinic <input type="checkbox"/> Other/Miscellaneous: _____				
How did you learn about the program? <input type="checkbox"/> My utility <input type="checkbox"/> Utility website <input type="checkbox"/> Newspaper <input type="checkbox"/> Community event <input type="checkbox"/> Mail/Bill insert <input type="checkbox"/> Contractor <input type="checkbox"/> Other: _____				
Contractor Information				
Name of Installing Contractor (if applicable)		Address, City	State	Phone

**Directions for submitting energy savings estimates. On a separate sheet(s) of paper, please:**

- Describe the project in one-to-two paragraphs
- List all known factors, assumptions and issues in any calculations you provide for kW and kWh energy savings.
- Provide clear and logical step-by-step calculations detailing the estimated energy savings.
- Show all units in the calculations
- Provide a copy of the vendor proposal showing pricing detail.
- Spreadsheets are accepted and encouraged; however, state calculation methodologies separately and clearly.

Measure Description <sup>e</sup>		Estimated Project Savings			Measure Cost (\$) <sup>b,c,d</sup>
		Demand (KW)	Annual Energy Use (kWh)	Total Savings (\$) <sup>a</sup>	
1					
2					
3					
4					
<b>Totals:</b>					

<sup>a</sup> All savings resulting from the project, to include - but not limited to - savings from energy reduction, maintenance, etc.  
<sup>b</sup> Measure cost is either the cost to remove/replace existing operational equipment, or it is the incremental cost to upgrade non operational equipment from standard efficiency to high efficiency equipment. See instructions for additional information.  
<sup>c</sup> Costs itemized by measure are required.  
<sup>d</sup> Include labor costs.  
<sup>e</sup> Measure refers to specific energy efficient project components. Examples would be "chiller replacement," "energy efficiency lighting conversion," "VSD air compressor replacement," etc.



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## Certifications and Signature

I hereby certify that: 1. The information contained in this application is accurate and complete; 2. All rules of this incentive program have been followed and 3. I have read and understand the terms and conditions included with this document.

I agree to verification of equipment installation which may include a site inspection by a program or utility representative. I understand that I am not allowed to receive more than one incentive from this program on any piece of equipment. I hereby agree to indemnify, hold harmless and release the utility from any actions or claims in regard to the installation, operation and disposal of equipment (and related materials) covered herein, including liability from any incidental or consequential damages.

Please sign and complete all information below.

Signature	Print Name	Date Submitted
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### For Administrator's Use Only

Measure Description	Demand (KW)	Annual Energy Use (kWh)	Total Savings (\$) <sup>a</sup>	Measure Cost <sup>b, c</sup>	Persistence	DDF	Status	Tracking Number
1							<input type="radio"/> Accept <input type="radio"/> Reject	
2							<input type="radio"/> Accept <input type="radio"/> Reject	
3							<input type="radio"/> Accept <input type="radio"/> Reject	
4							<input type="radio"/> Accept <input type="radio"/> Reject	



## CUSTOM APPLICATION FOR BUSINESS CUSTOMERS



### Terms and Conditions

1. **Pre-approval requirement:** All custom efficiency projects require written approval (notice to proceed) by the City of Portland before the customer takes any steps to purchase or install new equipment or systems. To qualify for an incentive, the approval date must precede any and all of the following: Purchase order dates, equipment order dates, equipment ship dates, invoice dates. Once approved, the applicant has 120 days to complete the project and submit an incentive application. Failure to complete the project within 120 days may result in loss of incentive payment. Written extensions may be granted contingent on scope, complexity and equipment lead time.
2. **Incentive Offer:** Projects must be implemented (completed) by December 31, 2009. Custom incentives will not be provided for projects with less than a 2-year simple payback or greater than a 7-year simple payback. Custom incentives are provided to cover no more than 40-percent of a project's cost and a maximum of **\$2,000**. Projects that are eligible for the prescriptive program do not qualify for the custom program. An original, signed application and invoices for materials and labor must be mailed to Portland Energy Smart Program, 1219 Turner Street, Lansing, MI 48906 **within 30 calendar days of installation (completion)**. Please keep a copy for your records.
3. **Proof of Purchase:** This application must have complete information and be submitted with **1) an invoice itemizing the new equipment purchased and 2) the manufacturer (OEM) specification sheets**. The invoice must indicate date of purchase, size, type, make, model and total project cost.
4. **Energy Savings:** Projects must result in reduced electric energy use due to improvement in the system efficiency; control upgrades may also qualify. Reduced electric use resulting from peak shaving, demand limiting, fuel switching, power generation, renewable energy, or operating schedule changes does not qualify.
5. **Compliance:**
  - a. All projects are expected to comply with federal, state, and local codes.
  - b. All equipment must be new or retrofitted with new components per the program specifications. Used or rebuilt equipment is not eligible for incentives. Existing equipment must be removed or permanently disconnected.
  - c. Equipment must meet specification requirements and be purchased and operating prior to submitting an incentive application.
  - d. Only one incentive will be granted for each project.
  - e. All projects must be a retrofit / replacement installation in an existing building (not available for new construction).
  - f. If the project is in a leased building, the term of the lease must be at least five (5) years.
6. **Payment:** Once completed paperwork is submitted, incentive payments are usually made within **30** calendar days. Incomplete applications will either delay payments or result in denial of application approval. The City of Portland reserves the right to refuse payment and participation if the customer or contractor violates program terms and conditions. The City of Portland must receive 100% of the energy savings for the rated life of the product(s) or for a period of three (3) years from receipt of rebate, whichever is less. If you do not provide the energy savings, if the facility in which the installed projects are located closes or ceases operation within the three (3) years from receipt of rebate or if you cease to be a customer of the City of Portland during the three (3) years, you shall refund a prorated amount of rebate dollars based on the time installed.
7. **Inspection:** All projects require pre-inspections and post-inspections.
8. **Publicity:** The City of Portland reserves the right to publicize your participation in this program, unless you specifically request otherwise.
9. **Program Discretion:** Incentives are available on a first-come, first-served basis. This incentive is subject to change or termination without notice at the discretion of the City of Portland.
10. **Logo Use:** Customers or allies may not use the City of Portland nor the Portland Energy Smart<sup>SM</sup> Program name or logo in any marketing, advertising, or promotional material without written permission.
11. **Disclaimers:** The City of Portland
  - a. does not endorse any particular manufacturer, product, labor or system design by offering these programs;
  - b. will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
  - c. does not expressly or implicitly warrant the performance of installed equipment or contractor's quality of work (contact your contractor for detailed warranties);
  - d. is not responsible for the proper disposal/recycling of any waste generated as a result of this project;
  - e. is not liable for any damage caused by the installation of the equipment or for any damage caused by the malfunction of the installed equipment.
12. **ELIGIBILITY:**

These incentives are offered by the City of Portland to electric customers only. For questions regarding eligibility, call 877-NRG-SAV1 (877-674-7281).