

Commercial and Industrial Custom Incentive Application Package



On October 15, 2008, Pennsylvania Governor Edward Rendell signed HB 2200 into law as Act 129 of 2008, with an effective date of November 14, 2008. A major portion of Act 129 is directed at increasing the efficiency of electric energy use among the citizens of Pennsylvania. In response to Act 129, PPL Electric Utilities filed an Energy Efficiency & Conservation Plan with the Pennsylvania Public Utility Commission on July 1, 2009.

The Custom Incentive Program is part of PPL Electric Utilities' plan designed to help customers use energy more efficiently, save money and reduce their carbon footprint.

Includes:

1. How to Apply
2. Custom Incentive Guidelines and Specifications
3. Applicant Information
4. Commissioning Plan Guidelines
5. Worksheet
6. Terms and Conditions

PPL Electric Utilities

Phone: 1-888-220-9991
E-mail: businessaccounts@pplweb.com

Step	Customer	PPL Electric Utilities Provides:
Apply for a Custom Incentive	Submit Custom Incentive Application	Possible Site Visit
	Develop Commissioning Plan	Approval Agreement
	Estimate Savings Calculations	
Perform Commissioning	Install Measures	
	Verify savings according to Plan	
Notify PPL Electric Utilities when project is complete	Submit Project Completion Form	Possible Site Visit
		Incentive Check

Before beginning any project, contact your PPL Electric Utilities Key Account Manager.

If you do not have a Key Account Manager, please contact PPL Electric Utilities' Major Accounts Department at: businessaccounts@pplweb.com or 1-888-220-9991.

I. HOW TO APPLY

STEP ONE – Complete the Custom Incentive Application

Before beginning any project, including removing, changing, or installing any equipment, you must submit a **Custom Incentive Application** with **Commissioning Plan**. PPL Electric Utilities will review your application to determine eligibility. A site visit may be required to further evaluate calculations, assumptions, facility descriptions, and savings estimates. PPL Electric Utilities must approve your commissioning plan which must identify in advance how the project's performance will be documented and verified, as well as agreed-upon project milestones.

If approved, PPL Electric Utilities will reserve the funds for your project. You will receive notification in the form of an **Approval Agreement** to proceed with installation. Funds that have been reserved are not transferable to other projects, facilities, or customers.

STEP TWO – Install Measures and Perform Commissioning

Perform commissioning according to your **Approval Agreement**. After PPL Electric Utilities approves your Custom Incentive Application, you should install the measures as set forth in the application. The measures must comply with all requirements detailed in the Custom Incentive Guidelines and Specifications (Section II) and comply with the Terms and Conditions (Section VI).

STEP THREE – Post Installation Inspection and Payment

Submit a completed **Project Completion Form** with a **Commissioning Report** to your Key Account Manager. PPL Electric Utilities may schedule an inspection at the facility site. PPL Electric Utilities reserves the right to adjust the incentive amount depending on inspection results and/or PPL Electric Utilities' review of the data presented within the **Commissioning Report**. After PPL Electric Utilities' review and approval of the **Commissioning Report** and verification of installation and compliance, PPL Electric Utilities will process the incentive payment within six weeks.

In order to comply with evaluation, measurement, and verification protocols established by the Pennsylvania Public Utilities Commission, PPL Electric Utilities reserves the right to make a reasonable number of site visits to your facility after installation. Visits will be at dates and times mutually agreed upon by you and PPL Electric Utilities. The purpose of the visits is to review the operation of the energy savings measures for program evaluation purposes. These additional site visits may occur after incentives have been paid but will not affect the incentive amount paid to you.

II. CUSTOM INCENTIVE GUIDELINES AND SPECIFICATIONS

The Custom Incentive Program provides financial incentives for electrical efficiency projects not eligible for any other E-power program. Each project must be submitted with all relevant data that will allow a professional engineer to duplicate the savings estimate provided. Incentives for custom measures are based on the projected savings performance of the project for the first 12 months following installation. Incentives are \$0.10/kWh, up to \$500,000 per customer site per year or \$2 million per parent company per year for customers with multiple sites. Incentives may not cover more than 50% of incremental cost. Customers do not have to apply for a Technical Study Reimbursement to be eligible for a Custom Incentive.

PRE-NOTIFICATION

Funding is limited for all E-power programs. Customers are strongly advised to speak with their PPL Electric Utilities' Key Account Manager before beginning any project. If you do not have a Key Account Manager, please contact PPL Electric Utilities' Major Accounts Department at 1-888-220-9991 or businessaccounts@pplweb.com. Funds for the project will not be reserved until the **Custom Incentive Application** and **Commissioning Plan** have been submitted and approved.

RIGHT TO INSPECT

PPL Electric Utilities reserves the right to inspect all projects to verify compliance with the program rules and verify the accuracy of project documentation. This may include obtaining detailed layout descriptions, metering, data collection, interviews, and utility bill data analysis. The customer must agree to provide PPL Electric Utilities access to records and installation sites during the program installation and after project completion.

PROJECT COMPLETION FORM

If a project is approved, PPL Electric Utilities will mail a **Project Completion Form** to the customer. The customer is responsible for notifying PPL Electric Utilities as soon as possible after project completion. "Project completion" is defined as the date the energy-efficient equipment becomes operational. Required documentation includes copies of all itemized, paid invoices and receipts detailing the specific equipment and purchases, the services provided, and any other costs. **Project Completion Forms** submitted more than three months following installation may be ineligible for payment.

RETROACTIVE ELIGIBILITY

If you installed energy efficiency measures on or after July 1, 2009 and before March 1, 2010, you may be eligible for a rebate. In order for these installed energy efficiency measures to be considered for a rebate, you must submit the **Applicant Information**, savings calculations, and supporting documentation along with the **Custom Incentive Worksheet**. After reviewing your documentation, PPL Electric Utilities may choose to contact you to discuss and verify the installed measures. The decision regarding retroactive rebates is the sole responsibility of PPL Electric Utilities. PPL Electric Utilities review and determination of retroactive rebates is final.

III. APPLICANT INFORMATION

Submit this form with the Custom Incentive Worksheet and Commissioning Plan

Date	PPL Account Number	Commercial <input type="checkbox"/>	Industrial <input type="checkbox"/>	
		Government <input type="checkbox"/>	Institutional <input type="checkbox"/>	
Facility Name		Parent Company		
Facility Address		City	State Zip	
Project Address (if different than above)		City	State Zip	
Contact <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.				
Title		Telephone		
Site Floor Area	Site Baseline Demand (kW)	Site Baseline (kWh)		
List all other PPL Bill Account Numbers of facility (if applicable)				
Customer Federal Taxpayer ID #	<input type="checkbox"/> Incorporated	<input type="checkbox"/> Not Incorporated	<input type="checkbox"/> Exempt	
Facility Type (check below)				
<input type="checkbox"/> Agricultural	<input type="checkbox"/> Educational	<input type="checkbox"/> Commercial	<input type="checkbox"/> Restaurant	<input type="checkbox"/> Municipal
<input type="checkbox"/> Medical	<input type="checkbox"/> Religious	<input type="checkbox"/> Community	<input type="checkbox"/> Industrial	<input type="checkbox"/> Grocery
<input type="checkbox"/> Small Office	<input type="checkbox"/> Large Office	<input type="checkbox"/> Other (please specify):		

I understand PPL Electric Utilities reserves the right to inspect all projects to verify compliance with the program rules. I have read and understand the requirements set forth in the Custom Incentive Program and warrant and represent that all information given is correct. By signature below, I verify that I have authority to represent the PPL Electric Utility account noted above.

Signature _____

Name _____ **Title** _____ **Date** _____

IV. COMMISSIONING PLAN GUIDELINES

The purpose of a commissioning document is to identify the scope, strategies and responsibilities for all of the team members within the commissioning process for each phase of the project. It outlines the overall process, schedule, organization, responsibilities and documentation to provide a quantitative demonstration of performance. Since each custom project is unique, a commissioning plan is required for each individual application. The commissioning task collects, analyzes and reports performance data for the installed measures in a way that demonstrates they are operating as intended, and are therefore likely to deliver the savings estimated in the **Custom Incentive Application**. These data should be summarized in the form of graphs and tables that communicate the energy and demand performance of the installed equipment.

These guidelines include the basic components of a commissioning plan but may be edited to suit the customer's needs. PPL Electric Utilities will review the commissioning plan with the full **Custom Incentive Application** and may request changes. The customer must either agree to these changes or suggest alternatives prior to starting project implementation. In order to be eligible for an incentive, a commissioning plan must be mutually agreed upon prior to beginning any project. **It is the customer's responsibility to present a convincing case for estimated energy savings.**

Sample Outline of a Commissioning Plan

- I. Commissioning Overview
 - Goals and Objectives
 - Building Information
 - Systems to be Commissioned
- II. Commissioning Team Members, Roles and Responsibilities
 - Commissioning Team and Contact Information
 - Roles and Responsibilities
 - Key Dates and Milestones
 - Communication Protocol
- III. Commissioning Tasks
 - Overview of Tasks
 - Description of Tasks by Proposed Measure
 - Basis of Design
 - i. Measure 1
 - Measure Intent (source of savings)
 - Data to be collected
 - Data collection equipment to be used
 - Presentation of the data
 - ii. Measure 2
 - Measure Intent (source of savings)
 - Data to be collected
 - Data collection equipment to be used
 - Presentation of the data

SUPPORTING DOCUMENTATION

The following must be included with the Commissioning Plan.

1. Complete description of the proposed project, the products and technologies used, and how they will be employed. Include definitions of the base case and details of the proposed equipment (provide manufacturer's specification sheets for both base and proposed cases, if possible).
2. All facilities, buildings, or equipment that will be affected by the project. Include all PPL Electric Utilities' Account Numbers.
3. Detailed cost breakdown by measure.

SAVINGS CALCULATIONS

Include all relevant data that will allow a licensed engineer to duplicate the savings estimate such as:

1. Concise description of the existing energy systems to be affected
2. Facility physical description and occupancy (including production activities and hours of operation)
3. Location of affected equipment
4. Measure by measure summary of the calculated savings associated with the project
5. Savings calculations for each measure
6. Condition and age of equipment if degradation in nameplate efficiency is assumed
7. Number of existing units
8. Ratings of equipment (wattage, nameplate, tonnage, voltage, et cetera)
9. Facility historical peak demand (if demand metered) and/or energy consumption data*
10. Clearly indicated assumptions and variables used in the analysis
11. Basis or rationale for each assumption and variable.

* Peak demand is defined by the Pennsylvania Public Utility Commission as the 100 hours of highest demand between June 8 and September 10 and between 10:00 and 22:00 hours.

VI. TERMS AND CONDITIONS

PPL Electric Utilities is offering incentives for cost-effective, energy-efficient improvements to businesses, manufacturing facilities, schools, and government buildings. This program is funded by nonresidential PPL Electric Utilities' customers and has been approved by the Pennsylvania Public Utility Commission as part of PPL Electric Utilities' Energy Efficiency and Conservation Plan.

PPL Electric Utilities makes no representations and provides no warranty or guarantee with respect to: (a) design, manufacture, construction, safety performance, or effectiveness of newly installed equipment or (b) the work performed by the installing contractor including any warranties of merchantability or fitness for a particular purpose. Customers are responsible for the installation of the measure in accordance with any and all laws, standards and codes. Customers are responsible for disposing of any equipment and materials according to local and state code requirements.

ELIGIBILITY

Incentives through the Custom Incentive Program are available only to PPL Electric Utilities customers served under nonresidential rate schedules. PPL Electric Utilities' Energy Efficiency and Conservation Plan ends on May 31, 2013 or until funding expires, whichever occurs first. All savings must be verified by that date unless otherwise noted in the Commissioning Plan.

Measures that will be eligible for an incentive must produce a verifiable reduction in annual electric energy consumption without creating an increase in summer peak demand usage; be installed in either a retrofit or new construction application; and prove to be cost-effective as measured by the Total Resource Cost ("TRC") test.

Measures that are excluded from consideration for this program include those that:

- * Are eligible for rebates through the PPL Electric Utilities' Energy Efficiency Rebate Program.
- * Receive a rebate through any other energy efficiency program offered by PPL Electric Utilities.
- * Produce an electric energy reduction through substitution of another energy source for electricity.
- * Merely terminate existing processes, facilities, or operations.
- * Relocate existing processes, facilities, or operations out of PPL Electric Utilities' service territory.
- * Are required by local, state or federal law; building or other codes; or are standard industry practices.

ENERGY SAVINGS ANALYSIS

Inspections and all submitted documentation of pre-existing conditions will be reviewed to determine project eligibility and to estimate the base case energy usage. Applicants will be responsible for submitting complete documentation that indicates the basis for projected energy savings. We reserve the right to require pre-project and/or post-project measurement and verification for any project. Customers agree to abide by PPL Electric Utilities' determination of project baselines, which will be based on conservative estimates in absence of verifiable data. Where applicable, ASHRAE (American Society of Heating, Refrigerating and Air-conditioning Engineers) standards will be the assumed baseline. Cases where a baseline energy use cannot be estimated may be disqualified.