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PPL ELECTRIC UTILITIES

# Commercial and Industrial Custom Incentive Program Technical Study Reimbursement 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. Technical Study Reimbursement Guidelines
3. Applicant Information
4. Technical Study Scope Application
5. Technical Study Reimbursement Application
6. Terms and Conditions.

## **PPL Electric Utilities**

Phone: 1-888-220-9991

E-mail:

[businessaccounts@pplweb.com](mailto:businessaccounts@pplweb.com)

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

**If you do not have a Key Account Manager, please contact the Major Accounts Department at [businessaccounts@pplweb.com](mailto:businessaccounts@pplweb.com) or 1-888-220-9991.**

## **I. HOW TO APPLY**

**To receive a Technical Study Reimbursement, follow these steps:**

### **STEP ONE – Complete a **Technical Study Scope Application****

Choose a qualified auditor to provide the information found on the **Technical Study Scope Application** for your facility. Request a scope of work and cost estimate. Complete the **Technical Study Scope Application**, and submit both documents to PPL Electric Utilities. PPL Electric Utilities will review your application and verify the auditor's qualifications and scope. If your application is approved, you will receive written notification to proceed with the Technical Study. Refer to Technical Study Reimbursement Guidelines (Section II) for further information.

Customers may elect to perform self-directed studies using in-house or contract resources. Such studies are not eligible for a Technical Study Reimbursement, but (subject to review by PPL Electric Utilities) may be used in support of a **Custom Incentive Application**. PPL Electric Utilities can accept, reject, or request revision of any study submitted in support of a **Custom Incentive Application**.

### **STEP TWO – Conduct the Technical Study and Submit a **Technical Study Reimbursement Application****

Once you have received written notification that your **Technical Study Scope Application** has been approved, proceed with your Technical Study. After you have received a report of the recommendations, you may submit the **Technical Study Reimbursement Application** which includes an Energy Conservation Measure (ECM) table. The table is used to itemize all recommendations made within the study report.

PPL Electric Utilities will provide you with an estimate of the Custom Incentive that may be available for the measures recommended in the Technical Study, and a list of the measures that may qualify for the Energy Efficiency Rebate Program. If the recommendations include equipment identified in the Energy Efficiency Rebate Program, you may install the equipment and separately submit a request for equipment rebates.

After submitting the **Reimbursement Application**, you will receive payment of up to 50% of the cost of the study. (See Section II for further details.) The payment percentage may be adjusted or reduced based upon cost effectiveness, analysis of non-electric measure, or other factors. In order to qualify for any remaining reimbursement, you must implement measures that lead to at least 50% of the found electrical savings. Please see Terms and Conditions for more information.

***Note: PPL Electric Utilities' customers do not need to apply for a Technical Study Reimbursement to qualify for the Custom Incentive Program. This is an optional step. The forms contained in this package are only for customers who are interested in and qualify for a Technical Study Reimbursement.***

## II. TECHNICAL STUDY REIMBURSEMENT GUIDELINES

**The Custom Incentive Program provides financial incentives for electrical efficiency projects not eligible for any other E-power program.** PPL Electric Utilities will reimburse a customer up to 100% of the cost for a Technical Study performed by an independent third party. Technical Study Reimbursements are designed only for facility audits examining equipment, processes, systems, and operations powered by electricity that would not be covered in any other E-power program. Customers may submit multiple applications for different projects, but Technical Study Reimbursements cannot exceed a total of \$100,000 annually. Technical Study Reimbursements are not intended for vendors, in-house assessments, equipment manufacturers or researchers. Reimbursements are for studies primarily examining electrical efficiency. PPL Electric Utilities reserves the right to adjust the reimbursement amount based on results that differ from the approved scope of work. Studies examining facilities with a mix of energy sources may be prorated on an individual basis.

Up to 50% of the cost will be reimbursed after the study is complete and meets all eligibility requirements. The remaining cost of the technical study may be reimbursed if the customer implements measures that lead to at least 50% of recommended identified electricity savings. Regardless of the type of measure, is the **customer's responsibility** to alert PPL Electric Utilities that it is eligible for the remaining reimbursement. Reimbursements may be adjusted based on the mix of electric and nonelectric savings identified. Studies are required to be cost effective.

### 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 an energy efficiency project. If you do not have a Key Account Manager, please contact our Major Accounts department at 1-888-220-9991 or [businessaccounts@pplweb.com](mailto:businessaccounts@pplweb.com). Funds for a Technical Study Reimbursement will not be reserved until the Technical Study Scope Application has been approved. Projected rebate amounts and incentives that are calculated by PPL Electric Utilities using the ECM table do not reserve any funding for the customer.

### RIGHT TO INSPECT

PPL reserves the right to inspect all projects to verify compliance with the program rules and validate 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 access to records and installation sites during the program installation and after project completion.

### RETROACTIVE ELIGIBILITY

If you had a technical study performed on your facility on or after July 1, 2009 and before March 1, 2010, you may be eligible for a rebate. In order to be considered for a rebate, you must submit the **Applicant Information, Technical Study Reimbursement Application**, and the Technical Study Report. The decision regarding retroactive rebates is the sole responsibility of PPL Electric Utilities. PPL Electric Utilities review and determination of retroactive rebates is final.

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### III. APPLICANT INFORMATION

Submit this form with the Technical Study Scope Application.

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** \_\_\_\_\_

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#### IV. TECHNICAL STUDY SCOPE APPLICATION

Please provide the scope of technical study that will be performed as a separate attachment. The scope should include, but is not limited to, a facility description with services provided or product produced, the background of why a technical study is warranted, a list with each measure that will be reviewed, the schedule, budget, and deliverables, and any assumptions about the facility. In general, the scope of work should eliminate any ambiguity about the project.

Date	PPL Account Number	
Estimated Cost of Study		
\$		
Estimated Potential Energy Savings		
KW:		KWH:
Name of vendor, firm, or individual to perform study:		
Email Address		Telephone
Date of Expected Completion (published study):		
List all relevant certifications of the professional chosen to complete the study. This may include accreditation, previous experience, or industry certifications.		
A certification of Professional Engineer, Certified Energy Manager, or Certified Energy Auditor is strongly recommended but not required. In absence of these qualifications, auditor must provide reasonable expertise and experience to qualify.		

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## 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.

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 and (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 in the PPL Electric Utilities' service territory served under nonresidential rate schedules. PPL Electric Utilities' Energy Efficiency and Conservation Plan ends on May 31, 2013 or when funding expires, whichever occurs first.

Eligible Technical Studies must reasonably attempt to identify energy saving measures that are likely to qualify for a Custom Incentive. 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. Technical Study Reimbursements will not cover project management or consultation fees.

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

- Are eligible for rebates through the 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. PPL Electric Utilities reserves 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.

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