

## Ready to get your incentive? Follow these simple steps.

This application is for projects completed between January 1, 2023 and December 31, 2023. To request pre-approval, this application must be completed, signed, and submitted with all required documentation prior to project initiation, ordering equipment, or issuing purchase orders. Incentives are available on a first-come, first-served basis. For more detailed information, refer to the Terms and Conditions included with this application. Please call 877.296.4319 or email [info@michigan-energy.org](mailto:info@michigan-energy.org) if you have questions about the application and/or pre-approval before you begin your project and prior to ordering any equipment.

### Annual Member Incentive Cap

- » Business or farm with a commercial utility rate code—\$15,000 cap.
- » Farm with a residential utility rate code—\$6,000 cap.

**Incentive Offer:** Incentives for custom measures are paid at \$0.07 per annual kWh savings (projected) or 75 percent of the project cost, whichever is lower.

### Step 1 Determine Eligibility

Equipment must be new (used equipment is not allowed) and installed in a commercial, industrial, or farm facility that is a Presque Isle Electric & Gas Co-op electric member, as well as meet minimum requirements set forth in this document. Projects must result in reduced electric energy usage due to improvement in the system efficiency; control upgrades may also qualify.

### Step 2 Submit an Application for Pre-Approval

Application must have complete information and should be submitted for pre-approval with:

- An IRS Form W-9 for payee (or Section 5 on page 2 of this application).
- The entire completed application. If this is a pre-approval request, Section 6 on page 2 of this form need not be signed at this time. If project is already complete, Section 6 must be signed.
- Description of project, energy savings estimates (clear and well documented), vendor proposal with pricing, and equipment specs/data sheets per the instructions on Pages 3 and 4.
- A copy of a recent month's electric utility bill.

### Step 3 Receive Pre-approval

Energy Optimization program staff will review the application materials and submit any follow-up questions to the member and the associated vendor. If the project meets the pre-approval criteria, the member will receive an email or letter indicating the project is pre-approved and funds are reserved for the project.

- Incomplete Custom Applications will cause delays.
- If you are applying for a custom incentive after the project is complete, your application will be reviewed and considered on a case-by-case basis.

### Step 4 Install Equipment

After returning the initial custom application and receiving pre-approval, the project may begin.

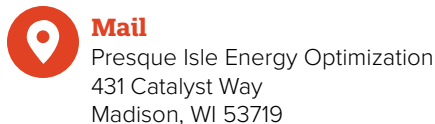
### Step 5 Notify the Program of Project Completion

Once your project is complete, contact your Energy Optimization program energy advisor or email [info@michigan-energy.org](mailto:info@michigan-energy.org). Provide the project completion date, the final project cost and supporting invoices, and identify any relevant changes that occurred since the project was originally pre-approved. Submit your documents as indicated below. Some projects may require site verification before the incentive can be processed. If this is the case, we will contact you to schedule a visit.

### Step 6 Payment

Once completed paperwork is submitted, your final application will be reviewed and processed for payment. Incentive payments are usually mailed within six to eight weeks.

## Submit your documents one of four ways:



Call **877.296.4319** for questions about this application.

**SECTION 1: Utility Member Information** (please print)

**2023 Energy Optimization Application**

Member Name (as shown on your electric utility bill):			
Member Mailing Address:	City:	State:	ZIP:

**SECTION 2: Job Site Information**

Job Site Name (if different than member name):	Project Contact Person Name:		
Project Contact Telephone: <input type="checkbox"/> Home/Office Number <input type="checkbox"/> Mobile Number	Project Contact Email:		
Job Site Street Address (physical location):	City:	State: <b>MI</b>	ZIP:
Electric Utility Company at Job Site:	Electric Utility Acct #:	Project Completion Date:	
What is the predominant use of the building space where equipment was installed? (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 <input type="checkbox"/> School: K-12 <input type="checkbox"/> School: College <input type="checkbox"/> Healthcare facility <input type="checkbox"/> Farm (commercial meter) <input type="checkbox"/> Farm (residential meter) <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			

**SECTION 3: Trade Ally (Contractor) Information**

Trade Ally Name (or indicate if self install):	Trade Ally Contact Person Name:		
Trade Ally Telephone:	Contact Email:		
Trade Ally Mailing Address:	City:	State:	ZIP:

**SECTION 4: Payee and Mailing Address**

Make Incentive Check Payable to (payee): <input type="checkbox"/> Member <input type="checkbox"/> Landlord <input type="checkbox"/> Trade Ally or other third party (By checking Landlord or Trade Ally, member is authorizing payment to the third party indicated. See <i>Third-Party Payees</i> section of Terms and Conditions for details.)			
Mail Check to: <input type="checkbox"/> Member Mailing Address (entered at top of this page) <input type="checkbox"/> Job Site Address <input type="checkbox"/> Payee W-9 Address <input type="checkbox"/> Alternate Pay Address (complete below)			
Alternate Pay Address (if checked above):	City:	State:	ZIP:

**SECTION 5: Payee IRS Form W-9 Information** (Submit IRS Form W-9 for payee OR fill out this section completely. This section may be omitted only if IRS Form W-9 for payee is submitted.)

Payee Legal Name (as shown on income tax return):	Payee Business Name (if different than payee legal name):		
Payee Legal Address:	City:	State:	ZIP:
Check the appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Other tax exempt organization or gov't agency <input type="checkbox"/> LLC - Enter the tax classification (C = C corporation, S = S corporation, P = partnership): _____ <b>Note:</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.			
Payee Tax Identification Number (TIN) (Complete <b>ONE</b> only. Must match payee legal name above.) FEIN #: _____ - _____ <b>OR</b> SSN: _____ - _____ - _____			
Certification: The following certifications are required in order for this form to substitute for the IRS Form W-9. Under penalties of perjury, I certify that: 1. The payee's TIN is correct. 2. The payee is not subject to backup withholding due to failure to report interest and dividend income. 3. The payee is a U.S. citizen. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.			
Payee Signature: /s/	Print Name:	Title:	Date:

**SECTION 6: Member Signature** (please read and sign)

The undersigned agrees that the stated energy-efficient measure(s) was (were) installed at the job site address listed above as part of the Energy Optimization program. I have read and agree to the Terms and Conditions within this application. 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 individual piece of equipment. I hereby agree to indemnify, hold harmless, and release the utility and program administrator 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. To the best of my knowledge, the statements made on this application are complete, true, and correct, and I have submitted the appropriate supporting documentation to receive an incentive. I have elected to utilize electronic signatures. I understand and intend that a legal signature is formed by typing my name on this document. If any of the parties do not wish to sign this document electronically, all must opt out together and print a paper copy to sign manually.

Member Signature: /s/	Print Name:	Title:	Date:
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## Custom Lighting Worksheet

These incentives are available for energy-saving measures that are not covered by the prescriptive lighting portion of the program. Custom incentives are based on the first-year electrical energy (kWh) savings.

When applying for pre-approval, submit the following items:

- Information in Sections 1 - 3 on page 2.
- Completed Custom Worksheet (below)
- Itemized quote/proposal for all related materials and any external (third-party) labor.
- Manufacturer's specification sheets for all equipment.

**Custom Incentive Rate: \$0.07 per kWh saved**

- In lieu of filling out these tables, calculations may be submitted in an unlocked spreadsheet (such as Excel).
- All new light fixtures and retrofit systems should be ENERGY STAR® or DLC qualified.

Existing Fixture #1		New Fixture #1	
<b>Description:</b>		<b>Description:</b>	
Watts per Fixture (A)		Watts per Fixture (E)	
Quantity of Fixtures (B)		Quantity of Fixtures (F)	
Annual Operating Hours (C)		Annual Operating Hours (G)	
Annual kWh Consumption (D) (A x B x C / 1,000)		Annual kWh Consumption (H) (E x F x G / 1,000)	
<b>Annual Energy Savings (D - H): _____ kWh</b>			

Existing Fixture #2		New Fixture #2	
<b>Description:</b>		<b>Description:</b>	
Watts per Fixture (A)		Watts per Fixture (E)	
Quantity of Fixtures (B)		Quantity of Fixtures (F)	
Annual Operating Hours (C)		Annual Operating Hours (G)	
Annual kWh Consumption (D) (A x B x C / 1,000)		Annual kWh Consumption (H) (E x F x G / 1,000)	
<b>Annual Energy Savings (D - H): _____ kWh</b>			

<b>Total Custom Lighting Project Cost:</b>	<b>\$</b>
<b>Total Annual Energy Savings (kWh) x \$0.07/kWh:</b> (Cannot exceed 75% of the total project cost)	<b>\$</b>

Note: Member acknowledges and agrees that Member cannot apply for, nor receive, incentives for the same product, equipment or service from more than one utility unless there are both electric and gas savings.

## Custom Non-Lighting Worksheet

These incentives are available for energy-saving measures that are not covered by other prescriptive portions of the program. Custom incentives are based on the first-year electrical energy (kWh) savings.

When applying for pre-approval, submit the following items:

- Information in Sections 1 - 3 on page 2.
- Completed Custom Worksheet (below)
- Itemized quote/proposal for all related materials and any external (third-party) labor.
- Manufacturer's specification sheets for all equipment.

**Custom Incentive Rate: \$0.07 per kWh saved**

1. Provide a detailed written description of the project.
2. Provide clear and logical step-by-step calculations detailing the estimated annual energy savings (kWh).
  - a) Submit calculations in an unlocked spreadsheet format (such as Excel). Do not send PDF copies of spreadsheets. Include page numbers, if needed to reference calculations or numbers on other pages.
  - b) Provide detailed and orderly calculations that can be followed without prior knowledge of the project.
  - c) Document any assumptions and inputs to calculations (e.g., hours of operation, load factor, power factor, motor efficiencies, etc.) and maintain consistency throughout calculations.
  - d) Identify key numbers (circled, bold, highlighted, etc.) and show correct units.

### Estimated Custom Non-Lighting Project Savings

	Measure Description <sup>a</sup>	Annual Energy Savings (kWh)	Measure Cost (\$) <sup>b,c,d</sup>
1			\$
2			\$
3			\$
4			\$

<sup>a</sup> Measure description refers to specific energy efficient project components (i.e. chiller replacement, industrial process improvement, 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.

<sup>c</sup> Costs itemized by measure are preferred.

<sup>d</sup> Include contracted labor costs, sales tax, disposal, permit fees, etc., related to the project.

<b>Total Custom Non-Lighting Project Cost:</b>	<b>\$</b>
<b>Total Annual Energy Savings (kWh) x \$0.07/kWh:</b> (Cannot exceed 75% of the total project cost)	<b>\$</b>

Note: Member acknowledges and agrees that Member cannot apply for, nor receive, incentives for the same product, equipment or service from more than one utility unless there are both electric and gas savings.

**INCENTIVE OFFER:** Projects must be implemented (completed) between January 1, 2023 and December 31, 2023. Projects must result in reduced electric energy usage due to improvement in the system efficiency; control upgrades may also qualify. Reduced electric use resulting from peak shaving, demand limiting, power generation, renewable energy (including solar PV and wind), or operating schedule changes will not qualify. This application form is for facilities with a commercial or industrial electric meter or rate code. Farms with a residential or commercial meter may also apply. Other businesses with a residential meter must use the residential programs.

**COMPLIANCE:** a) All projects must comply with applicable federal, state, and local laws, and building codes. b) All equipment must be new or retrofitted with new components per the program specifications. Used equipment is not eligible for incentives. Leased equipment must receive pre-approval BEFORE project initiation or entering into the equipment lease. Existing equipment must be permanently disconnected or removed and not reused elsewhere. c) New equipment must meet specification requirements. d) For prescriptive programs, new equipment must be operational when the application is submitted. e) Only one incentive will be granted for each project. f) Members may submit multiple projects in a calendar year; however, the incentive totals may not exceed the annual incentive cap without utility authorization. g) New construction projects will be considered with prior review and authorization. Note that the measures and incentives listed on the application form are typically intended for retrofit projects; not all measures listed may be available for new construction projects. h) If the project is in a leased building, the term of the lease must be at least three (3) years and a copy of the lease may be requested. i) Up to 24 months of utility usage information may be requested.

**DELIVERY:** Applications must be delivered via mail to Presque Isle Energy Optimization Programs, 431 Catalyst Way, Madison, WI 53719, emailed to [info@michigan-energy.org](mailto:info@michigan-energy.org), submitted online, or faxed to 608.646.7682.

**PRESCRIPTIVE APPLICATIONS:** Pre-approval is not required for prescriptive incentives unless otherwise specified. However, an incentive will not be provided for projects or equipment that does not precisely meet the requirements provided on the prescriptive application form. Applications must have complete information and be submitted with the supporting documentation specified on the form instructions. Unless otherwise specified, incentives for prescriptive measures may not exceed 75 percent of the total project cost, including materials, sales tax, external labor (i.e. contracted labor), permits, equipment rental, and disposal. To qualify, lighting must be used a minimum of 1,800 hours per year and other equipment must operate a minimum of 1,500 hours per year, unless otherwise specified.

**CUSTOM APPLICATIONS:** Pre-approval is strongly encouraged for all custom projects. If your project does not fit the descriptions on the standard prescriptive incentive application form, it may qualify for a custom incentive. Applications must have complete information and be submitted with the calculations and supporting documentation specified on the form instructions. Unless otherwise specified, incentives for custom measures may not exceed 75 percent of the total project cost, including materials, sales tax, external labor (i.e. contracted labor), permits, equipment rental, and disposal. Note: Internal labor (i.e. non-contracted labor) may not be included in the cost of the project.

**PAYMENT:** Once completed paperwork is submitted, incentive payments are usually mailed within six to eight weeks. Incentive payments are made by check, and may arrive in multiple checks. Incomplete applications will either delay payments or result in denial of application approval. Presque Isle Electric & Gas Co-op reserves the right to refuse payment and participation if the member or trade ally violates program terms and conditions. Presque Isle Electric & Gas Co-op must receive 100 percent of the energy savings for the rated life of the product(s) or for a period of three (3) years from receipt of incentive, whichever is less. If the project does not provide the energy savings, if the facility in which the installed projects are located closes or ceases operation within three (3) years from receipt of incentive, or if you cease to be a member of Presque Isle Electric & Gas Co-op during the following three (3) years, you shall refund a prorated amount of incentive dollars based on the time installed.

**THIRD-PARTY PAYEES:** The Presque Isle Electric & Gas Co-op member may authorize payment of the incentive directly to a landlord, trade ally, or other third-party payee by selecting the appropriate box in Section 4 on page 2 of the application. In all cases, the third-party payee must either complete Section 5 on page 2 of the application or submit an IRS Form W-9. Program staff reserve the right to contact the member to confirm third-party payee requests.

**TRADE ALLY INFORMATION:** The term "trade ally" refers to the company or contractor who provides or installs equipment for the Presque Isle Electric & Gas Co-op member. If the project was completed by more than one trade ally (e.g., equipment was purchased from one trade ally but installed by another) and the incentive is being paid to the co-op member, enter the information of the trade ally who installed the equipment in the Trade Ally (Contractor) Information section on page 2 of the application. Trade allies participating in the program must adhere to standards of acceptable business behavior and performance.

**INSPECTION:** Program staff reserve the right to conduct pre-inspections and post-inspections of proposed and installed projects. Some projects may require site verification or phone verification before the incentive will be processed.

**PUBLICITY:** Presque Isle Electric & Gas Co-op reserves the right to publicize your participation in this program, unless you specifically request otherwise.

**PROGRAM DISCRETION:** Incentives are available on a first-come, first-served basis. Incentive amounts and offerings are subject to change or termination without notice at the discretion of Presque Isle Electric & Gas Co-op.

**LOGO USE:** Members or trade allies may not use the Presque Isle Electric & Gas Co-op name or logo in any marketing, advertising, or promotional material without written permission.

**DISCLAIMERS:** Presque Isle Electric & Gas Co-op: 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 member 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; f) is not responsible for items (incentive applications, supporting documentation, and/or incentive checks) lost or damaged in the mail.

**ELIGIBILITY:** These incentives are offered to Presque Isle Electric & Gas Co-op members with active electric service in Michigan only. For questions regarding eligibility, call 877.296.4319.

**INFORMATION RELEASE:** The member requests and authorizes Presque Isle Electric & Gas Co-op to release electric usage for the preceding 24 months to Energy Optimization program staff, in order to participate in the program. The authorization to release information expires automatically two (2) years after signature date. The member agrees that the Energy Optimization program and their contractors may include the member's name, address, electric account number, electric services, and resulting energy savings ("Information") in a database hosted by a contractor of the Energy Optimization program and such information may be included in reports or other documentation submitted to Presque Isle Electric & Gas Co-op, and their contractors and/or the Michigan Public Service Commission ("Reports"). Such parties will treat such Information as confidential and the Information in the Reports shall only be in the aggregate.

**RELEASE/INDEMNIFICATION:** Payment of incentives under the Energy Optimization program and/or evaluation of applications for incentives shall not deem the Energy Optimization program or any of its affiliates, employees, contractors, or agents ("Energy Optimization Parties") to be responsible for any work completed in connection herewith. The applicant fully releases Energy Optimization Parties from any and all claims it may have against Energy Optimization Parties in connection with this application, the incentives, or the work performed in connection with them. In addition, the applicant agrees to defend, indemnify and hold Energy Optimization Parties harmless from and against any and all claims, losses, demands, or lawsuits by any third parties arising in connection with this application, the payment or non-payment of incentives, or any work performed in connection with them. The member hereby releases Presque Isle Electric & Gas Co-op from any and all liability arising from or connected with releasing the information to the Energy Optimization program set forth herein.

**NON-DISCLOSURE:** The Energy Optimization program agrees not to disclose project information, such as pricing, proprietary equipment specifications, or other intellectual property. Such information will be used by Energy Optimization program staff only for the purpose of validating and fulfilling incentive applications. Such information will not be shared outside of the Energy Optimization program.

**ANNUAL MEMBER INCENTIVE CAP:** Incentives are available on a first-come, first-served basis; apply early. Incentive budgets are limited, therefore total annual incentive amount per member may be limited as follows: Business or farm with a commercial utility rate code – \$15,000 cap. Farm with a residential utility rate code – \$6,000 cap. If a larger incentive amount is needed to enable your project to move forward, please call to request pre-approval prior to beginning your project.