

## Custom Incentive Application for Business Customers

A Cash Incentive Energy Efficiency Program brought to you by:



### Instructions for Use:

*For complete instructions, please refer to the Terms and Conditions on pages 7 and 8.*

**Step 1.** Contact The Utility to confirm customer eligibility and availability of program funds.

**Step 2.** Complete and sign the application for your proposed project. Submit it, along with required documentation, to The Utility for pre-approval. The following items must be included with the initial application:

- A. Descriptions of the existing and proposed equipment or measure.
- B. Calculations of estimated demand and energy savings, along with documentation of assumptions.
- C. Certification of the calculations and measures proposed.

**Step 3.** The Utility will contact you to schedule a site visit for verification of equipment.

**Step 4.** When The Utility provides written pre-approval (Notice to Proceed), purchase and install the energy-efficient equipment or measure.

**Step 5.** **Within 90 days after the equipment has been installed and is operational, resubmit the application form with updated calculations of demand and energy savings, along with copies of itemized invoice(s), including costs, quantities, makes, model numbers, sizes, and manufacturer's specification sheets showing efficiency ratings for all installed equipment.**

**Step 6.** Schedule a post-inspection site visit with The Utility.

**Step 7.** If you wish to assign payment of the incentive directly to a contractor or vendor, fill out the Alternative Incentive Recipient section of the application and sign your name to authorize payment.

**Step 8.** Initial applications and subsequent submittals must be mailed, e-mailed or faxed to The Utility at the address listed below.

**Step 9.** Post-installation submittals must be submitted within 90 days of completion of the project.

Please allow 6 to 10 weeks for final review and processing of your completed application and payment of eligible incentives.

Marshall Municipal Utilities  
 113 South 4th Street  
 Marshall, MN 56258  
 Phone: (507) 537-7005  
 Fax: (507) 537-6836

Please note: Marshall Municipal Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. Marshall Municipal Utilities and Missouri River Energy Services together will be referred to as "The Utility" throughout this document.



Please visit [www.brightenergysolutions.com](http://www.brightenergysolutions.com) for more information about the Bright Energy Solutions® Programs.

## Customer Information (Please Print)

Company Name		Contact Name		Date Submitted
Mailing Address		City	State	ZIP Code
Installation Address		City	State	ZIP Code
Phone		Installation (Completion) Date	Facility Sq. Footage	
Email address (by providing your email address, you are granting The Utility permission to send emails regarding this project or updates on our incentive programs)		Building Use – Please Check One:		
		<input type="checkbox"/> Office <input type="checkbox"/> Retail <input type="checkbox"/> 24-hour Facility <input type="checkbox"/> Warehouse <input type="checkbox"/> Restaurant <input type="checkbox"/> Lodging <input type="checkbox"/> Grocery/Supermarket <input type="checkbox"/> Manufacturing		
Municipality Utility Name & Account Number		School: <input type="checkbox"/> Elementary/Secondary <input type="checkbox"/> College      Healthcare: <input type="checkbox"/> Clinic <input type="checkbox"/> Hospital <input type="checkbox"/> Other/Miscellaneous: _____		
How did you learn about the program? <input type="checkbox"/> My Utility <input type="checkbox"/> Contractor/Supplier <input type="checkbox"/> Community Event <input type="checkbox"/> Mailing <input type="checkbox"/> Bill insert <input type="checkbox"/> Other: _____				
Is the Space Air Conditioned?  <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Facility Hours of Operation</b>			
	Hours per Day	Days per Week	Weeks per Year	Hours per Year (hours X days X weeks)

## Vendor/Contractor Information

Company Name		Contact Name		Phone
Address		City	State	ZIP
Fax		Email (by providing the vendor's email address, you are granting The Utility permission to send emails regarding this project)		

## Payment Information

**Please process payment to:**     Customer (listed above)     Vendor/Contractor (listed above)     Alternative Recipient

***If payment is to be made to an Alternative Recipient, please complete the remainder of this section:***

Company Name		Contact Name		Phone
Address		City	State	ZIP

Please summarize the operational characteristics of the equipment associated with the proposed measure. All calculations used and assumptions made in this section must be included. The data contained in, or attached with, this application must be sufficient to verify the demand and energy reductions described. Attach additional materials and specifications as necessary. If more than one piece of equipment is involved with this project, please photocopy this sheet and describe each individual energy-saving measure on a separate sheet and provide the associated documentation described above for each item of equipment.

LED Lighting: In order to be considered for an incentive in the Custom Program, all LED products must be either ENERGY STAR® qualified or DesignLights™ Consortium approved. For details, contact your local utility representative or see [www.energystar.gov](http://www.energystar.gov) and [www.designlights.org](http://www.designlights.org).

Please describe, in detail, the **EXISTING or BASELINE** piece of equipment (make, model, type, efficiency rating, wattage):

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Please describe, in detail, the **PROPOSED** piece of equipment (make, model, type, efficiency rating, wattage):

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The proposed equipment is (check one):  New Equipment    Retrofit Equipment    Replace Failed Equipment  
(Retrofit Equipment is a replacement of working equipment. Replace Failed Equipment is replacing equipment that is no longer functioning.)

Incentive Period	kW Demand and Energy use of existing equipment or base model comparison		kW Demand and Energy use of proposed measure or equipment		Monthly kW savings	Monthly kWh savings
	A (Peak kW*)	B (Monthly kWh)	C (Peak kW*)	D (Monthly kWh)	E (A-C)	F (B-D)
January						
February						
March						
April						
May						
KW Incentive Period	June					
	July					
	August					
	September					
October						
November						
December						
<b>TOTAL</b>					<b>kWh saved/year total</b>	

\* Peak kW = Average 15 minute peak demand (kW), while the proposed equipment is operating, on weekdays during the 1pm to 8pm time period during each month. Equipment must regularly operate during the peak period in the months of June, July, August, and September to qualify for an incentive under the Custom Program.

### Custom Incentive Calculations

For lighting and lighting related technologies, the custom incentive is calculated from the average demand savings multiplied by the demand incentive rate described below. For all other technologies, the custom incentive is the total of the average demand savings multiplied by the demand incentive rate, plus the energy savings multiplied by the energy incentive rate described on page 5. All custom incentives are capped at 75% of project cost.

#### kW (Demand) Reduction Incentive Calculation

kW Savings of measure from June + July + Aug + Sept <input style="width: 100%; height: 20px;" type="text"/> (From Column E above)	÷ 4 months =	Average Summer Peak Demand Savings <input style="width: 100%; height: 20px;" type="text"/>	X \$300 / kW =	A	Incentive Amount <input style="width: 100%; height: 20px;" type="text"/>
Total project cost of measure: \$ _____ x 75% = B					<input style="width: 100%; height: 20px;" type="text"/>
TOTAL kW (DEMAND) INCENTIVE = C (Lesser of Box A or B)					<input style="width: 100%; height: 20px;" type="text"/>

**THIS SECTION APPLIES TO BOTH LIGHTING/LIGHTING RELATED TECHNOLOGIES AND NON-LIGHTING RELATED TECHNOLOGIES. FOR NON-LIGHTING RELATED TECHNOLOGIES, CONTINUE TO THE FOLLOWING SECTION.**

**THIS SECTION DOES NOT APPLY TO LIGHTING AND LIGHTING RELATED TECHNOLOGIES**

kWh (Usage) Reduction Incentive Calculation – ONLY FOR TECHNOLOGIES OTHER THAN LIGHTING			
	<b>Annual kWh Savings</b> <input style="width: 100%; height: 20px;" type="text"/> From Page 4, Column F	X \$0.01 / kWh	
		= D	<b>Incentive Amount</b> <input style="width: 100%; height: 20px;" type="text"/>
C	<input style="width: 100%; height: 20px;" type="text"/> kW Incentive (Box C from page 4)	+ D	<input style="width: 100%; height: 20px;" type="text"/> kWh Incentive (Box D)
		= E	<input style="width: 100%; height: 20px;" type="text"/>
			<b>Incentive Limited to 75% of Total Project Cost (Box B from page 4) = B</b> <input style="width: 100%; height: 20px;" type="text"/>
			<input style="width: 100%; height: 20px;" type="text"/>
			<b>TOTAL kW (Demand) and kWh (Usage) Incentive = F</b> (Lesser of Box E or B) <input style="width: 100%; height: 20px;" type="text"/>
			<b>For technologies other than lighting and lighting related, Box F is the TOTAL INCENTIVE</b>

## General Equipment/Project Eligibility

- Equipment or measures installed under the Custom Program must result in a reduction in electric load.
- All projects must be pre-approved and receive a written Notice to Proceed to qualify for an incentive. Equipment ordered, purchased or installed prior to approval will not qualify for incentives unless special exception is made by The Utility, in its discretion.
- Equipment must operate a minimum of 1500 hours annually to be eligible.
- All LED lighting products must be either ENERGY STAR qualified or DesignLights Consortium approved.
- All installations must be permanent.
- Measures with less than a 5 year useful life or projects eligible for other Bright Energy Solutions programs are not eligible.
- All installations must meet state and local electrical code and building code requirements.
- Customer is responsible for proper disposal or recycling of any hazardous material and old or removed equipment.
- Existing equipment must be removed or permanently disconnected.
- Back-up or redundant equipment does not qualify.
- Products required by code do not qualify.
- Project must result in reduced energy use due to improvement in system efficiency. Control upgrades may also qualify.
- Projects involving fuel switching do not qualify.
- Projects involving operational or settings changes with no capital cost do not qualify.
- Power generation projects do not qualify.
- Peak shifting or load shedding projects do not qualify.
- Renewable projects do not qualify.
- Projects shall provide savings to the utility for the life of the equipment. If the applicant ceases to be a customer of The Utility, or the equipment is removed prior to the end of the useful life of the equipment, the applicant may be required to return a prorated amount of the incentive, if requested by The Utility.

## Certifications and Signature

I hereby certify that: 1. The information contained in this application is accurate and complete; 2. All installation is complete and the unit(s) is operational prior to submitting application; 3. All rules of this incentive program have been followed, and 4. I have read and understand the terms and conditions applicable to this incentive program as set forth in this application, including those set forth on pages 7 and 8 below.

The customer agrees to verification of equipment installation which may include a site inspection by a program or utility representative. The customer understands that it is not allowed to receive more than one incentive from this program on any piece of equipment. The customer agrees to indemnify, defend, hold harmless and release The Utility from any claims, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or relating to the removal, disposal, installation, or operation of any equipment or related materials in connection with the programs described in this application, including any incidental, special or consequential damages.

Please sign and complete all information below.

Customer Signature	Print Name	
	Title (if applicable)	Date

## Member Utility Use Only

Date Received	Pre-Inspected? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Pre-Inspected: Initials:	Post-Inspected? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Post-Inspected Initials:
Incentive Approved <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount :\$		Date Approved	
Utility or Program Representative				
BESTraK Control #				

## TERMS AND CONDITIONS

### 1. Eligibility:

- a) These incentives are offered by Missouri River Energy Services and its participating members. For questions regarding eligibility, call your local utility listed on the cover page of this application.
- b) Commercial, industrial, and governmental customers who purchase electricity from The Utility are eligible to participate in the Bright Energy Solutions® Custom Incentive Program. Eligible equipment must be connected to an electric service billed under a commercial or industrial rate class by The Utility.
- c) Equipment or measures installed under the Custom Program must result in a reduction in electric load.
- d) All projects must be pre-approved and receive a written Notice to Proceed to qualify for an incentive. Equipment ordered, purchased or installed prior to approval will not qualify unless special exception is made by The Utility, in its discretion.
- e) Equipment must operate a minimum of 1500 hours annually to be eligible.
- f) All installations must be permanent.
- g) Measures with less than a 5 year useful life or projects eligible for other Bright Energy Solutions programs are not eligible.
- h) All installations must meet federal, state and local electrical code and building code requirements.
- i) Customer is responsible for proper disposal and recycling of any hazardous material and old or removed equipment.
- j) Customers may not receive more than one incentive for each piece of equipment installed under this program or any combination of Bright Energy Solutions programs.
- k) This program is applicable only to projects and equipment that meet the detailed specifications and requirements of this application. The Utility will determine, in its discretion, whether such specifications and requirements have been satisfied.

### 2. Application:

- a) All custom efficiency projects require written pre-approval (Notice to Proceed) by The Utility before the customer takes any steps to purchase new equipment or systems. To qualify for incentives under this program, the customer must receive written pre-approval from The Utility prior to the dates of any purchase orders, invoices, bills of lading or other purchase or shipping documents for any equipment, materials or services relating to the project.
- b) This program is offered January 1 through December 31 of the respective calendar year. Due to limited funding, this incentive offer can be changed or withdrawn at any time without notice and is available on a first-come, first-served basis.
- c) All sections of the incentive application must be read, completed in its entirety, signed and submitted to The Utility for pre-approval. After project completion, the customer must resubmit the application form with updated calculations for demand and energy savings.
- d) Data contained in the application must be sufficient to verify the size, the efficiency, the costs, and the assumptions and calculations for demand and energy savings described in the application. The customer must provide any additional data reasonably requested by The Utility.
- e) Demand and energy savings calculations and assumptions must be certified by a qualified individual representing the customer.
- f) The customer must submit copies of all project invoices, specifying materials/equipment purchased (including make, model, size, efficiency rating, etc.), date ordered, installation costs, and disposal costs for old equipment, if applicable.
- g) Updates of the application must be submitted to The Utility within 90 days after project installation is complete.

### 3. Compliance:

- a) All projects must 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 and properly disposed of.
- c) Equipment must meet specification requirements and be purchased, installed and operating prior to resubmitting the application for payment.
- d) Customers may only receive one incentive per piece of qualifying equipment.
- e) All terms and conditions of this application must be satisfied by the customer.

### 4. Incentives:

- a) Bright Energy Solutions offers incentives for the installation of high efficiency equipment or the implementation of process improvements that result in energy savings.
- b) The incentive will be based on a dollar amount per average kW removed during the months of June, July, August, and September. For projects involving other than lighting and lighting related technologies, an additional incentive per annual KWH saved is offered. See page 4 for more information on incentives.
- c) Incentives apply only to new equipment that is installed in facilities that are served electrically by The Utility.
- d) Equipment installations are subject to inspection by utility personnel before and after installation and prior to approval of an incentive.
- e) The Utility reserves the right to revise incentive levels and/or qualifying efficiency levels at anytime. Projects that were pre-approved prior to the effective date of changes will be eligible for the incentive amount at the time the application was filed or for the new incentive amount, whichever is higher. Projects that have not been pre-approved prior to the date of changes to the incentive will be eligible for the new incentive amount only.
- f) The customer assumes all responsibility for any tax consequences resulting from an incentive payment under this program.

- g) The Utility reserves the right to limit any incentive amount or make adjustments to correct incentive calculations or assumptions, in its discretion.
  - h) The Utility reserves the right to disqualify any type of equipment from this program.
  - i) Incentive payments are limited to \$100,000 per calendar year per customer under the Custom Program. Payments for larger incentives may be allowed at the discretion of The Utility and, if permitted, may be paid in increments over more than one year. Incentives will be paid on a "first-come, first-served" basis. The minimum incentive application is \$500.
  - j) Customers may not receive more than one incentive for each piece of equipment installed under this program or any other Bright Energy Solutions program.
  - k) **The total incentive is limited to 75 percent of the project cost, including installation. If self-installed, incentives for items of equipment can be up to the purchase price of a specific item, but shall not exceed the Bright Energy Solutions incentives set by Missouri River Energy Services.**
5. **Payment:** Once completed paperwork is submitted, incentive payments are usually made within 6-10 weeks. Incomplete applications will either delay payments or be denied. The Utility reserves the right to refuse payment and participation if the customer or the customer's contractor violates program rules and procedures.
  6. **Inspection:** Equipment installations are subject to inspection by utility personnel before and after installation and prior to approval of an incentive. The Utility may inspect customer records relating to incentives sought by the customer.
  7. **Information Sharing:** The Utility reserves the right to publicize your participation in this program, unless you specifically request otherwise in writing. Information contained in this application may be shared with state boards, commissions, departments, and with other Bright Energy Solutions participating utilities.
  8. **Program Discretion:** Incentives are available on a first-come, first-served basis. This program and its incentive amounts are subject to change or termination without notice at the discretion of The Utility. Neither pre-approval of a project, nor any other action by The Utility, will entitle a customer to an incentive payment until the application is finally approved by The Utility.
  9. **Logo Use:** Customers or trade allies may not use the name or logo of Bright Energy Solutions, The Utility, or any other participating utility in any marketing, advertising, or promotional material without written permission.
  10. **Disclaimers:** The Utility
    - 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 any contractor's quality of work (contact the equipment manufacturer or contractor for 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, injury, or loss of life arising from or relating to the removal, installation, or operation of any equipment, or any other action taken by the customer or The Utility, in connection with a project undertaken by the customer under the program described in this application;
    - f) does not guarantee that a specific level of energy or cost savings will result from the implementation of energy efficiency measures or the use of products funded under this program.