



2022 Incentive Application Custom Projects

Ready to get your incentive? Follow these simple steps.

This application is for projects completed between January 1, 2022 and December 31, 2022. 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 888.476.9534 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—\$30,000 cap.
- » Farm with a residential utility rate code—\$15,000 cap.

Incentive Offer: Incentives for custom measures are paid at \$0.06 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 Great Lakes Energy 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 Efficiency 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 Wise program energy advisor or call 888.476.9534. 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 online, fax, or by mail.
Call 888.476.9534 for questions about this application.



Fax
608.646.7682



Online
gtlakes.com/energy-wise



Mail
Great Lakes Energy Wise
431 Charmany Drive
Madison, WI 53719

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

Member Name:			
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"/> Office Number <input type="checkbox"/> Mobile Number	Project Contact Email:		
Job Site Street Address (physical location):	City:	State: MI	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/Misc. _____			
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 (By checking Landlord or Trade Ally, member is authorizing payment to the third party indicated. See <i>Trade Ally Information</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.)

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): _____ Note: 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 ONE only. Must match payee legal name above.) FEIN #: _____ - _____ - _____ OR 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 Wise 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: \$0.06 per kWh saved

- In lieu of filling out these tables, submit calculations in an unlocked spreadsheet (such as Excel).
- Incentives are eligible for replacement of interior fixtures/retrofits.
- All new light fixtures and retrofit systems should be ENERGY STAR® or DLC listed.

Existing Fixture		New Fixture	
Description:		Description:	
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)	
Annual Energy Savings (D - H): _____ kWh			

Existing Fixture		New Fixture	
Description:		Description:	
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)	
Annual Energy Savings (D - H): _____ kWh			

Total Custom Lighting Project Cost:	\$
Total Annual Energy Savings (kWh) x \$0.06/kWh: (Cannot exceed 75% of the total project cost)	\$

Note: Customer acknowledges and agrees that Customer 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: \$0.06 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 ^a	Annual Energy Savings (kWh)	Measure Cost (\$) _{b,c,d}
1			\$
2			\$
3			\$
4			\$

^a Measure description refers to specific energy efficient project components (i.e. chiller replacement, industrial process improvement, etc.)

^b 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.

^c Costs itemized by measure are preferred.

^d Include contracted labor costs, sales tax, disposal, permit fees, etc., related to the project.

Total Custom Non-Lighting Project Cost:	\$
Total Annual Energy Savings (kWh) x \$0.06/kWh: (Cannot exceed 75% of the total project cost)	\$

Note: Customer acknowledges and agrees that Customer 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, 2022 and December 31, 2022. 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 Great Lakes Energy Wise Programs, 431 Charmany Drive, Madison, WI 53719, faxed to 608.646.7682, or submitted online.

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. In landlord/tenant arrangements where the electric utility account is in the tenant's name, the incentive may be made payable to the landlord by selecting the appropriate box in Section 4 on page 2 of this form and entering landlord's information in Section 5 on page 2. Incomplete applications will either delay payments or result in denial of application approval. Great Lakes Energy reserves the right to refuse payment and participation if the member or contractor violates program terms and conditions. Great Lakes Energy 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 Great Lakes Energy during the following three (3) years, you shall refund a prorated amount of incentive dollars based on the time installed.

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: Great Lakes Energy 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 Great Lakes Energy.

LOGO USE: Members or trade allies may not use the Great Lakes Energy name or logo in any marketing, advertising, or promotional material without written permission.

DISCLAIMERS: Great Lakes Energy: 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 Great Lakes Energy members with active electric service in Michigan only. For questions regarding eligibility, call 888.476.9534.

INFORMATION RELEASE: The member requests and authorizes Great Lakes Energy to release electric usage for the preceding 24 months to Energy Wise 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 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 program and such information may be included in reports or other documentation submitted to Great Lakes Energy, 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 Wise program and/or evaluation of applications for incentives shall not deem the program or any of its affiliates, employees, contractors, or agents ("Energy Efficiency Parties") to be responsible for any work completed in connection herewith. The applicant fully releases Energy Efficiency Parties from any and all claims it may have against Energy Efficiency 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 Efficiency 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 Great Lakes Energy from any and all liability arising from or connected with releasing the information to the program set forth herein.

TRADE ALLY INFORMATION: A trade ally represents the company who provided or installed the equipment for a project for which a member is seeking an incentive. If the project was completed by more than one trade ally (example: equipment was purchased from one trade ally but installed by another trade ally) and the incentive is being paid to the member, please enter the information of the trade ally who installed the equipment in Section 3: Trade Ally (Contractor) Information. The member may authorize payment of the incentive directly to the trade ally if trade ally has deducted the incentive from the customer's amount due on the invoice. If payment is to be sent directly to the trade ally, the incentive amount MUST be clearly labeled as the Energy Wise program incentive and deducted from the amount due on the invoice. To receive this reimbursement, trade ally must complete Payee IRS Form W-9 Information section on page 2 OR submit IRS form W-9. The reimbursement will not exceed the actual incentive amount.

NON-DISCLOSURE: The Energy Wise program agrees not to disclose project information, such as pricing, proprietary equipment specifications, or other intellectual property. Such information will be used by program staff only for the purpose of validating and fulfilling incentive applications. Such information will not be shared outside of the 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 - \$30,000 cap. Farm with a residential utility rate code - \$15,000 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.