



2013–2014 Customized New Construction and Savings By Design Form

PROJECT INFORMATION

Project Name Check if participating in PG&E Local Government/Statewide Partnership

PG&E Local Government/Statewide Partnership Name (if applicable)

Project Site Address City State Zip

Contact Name (if different from Applicant) Title

Contact Telephone Number Contact Fax Number Email

Building Description/Type Conditioned Sq. Ft. Est. Plan Finalization Date Est. Construction Completion Date

Facility Description/Type Years since built or last major renovation Total Sq. Ft. of Facility

Project Type (check one) **End Use Kickers** (check one)

New Construction (including additions) Renovation/remodel (including tenant improvement) End-use Monitoring Enhanced Commissioning

Type of Business/Organization

Fabrication Food Processing Office Religious Institution
 Restaurant Retail School Other (please specify) _____

DESIGN TEAM INFORMATION (Savings By Design Only)

Please complete the following information (if applicable):

Architectural Firm Address, City, State, Zip

Contact Name Contact Telephone Email

Mechanical Engineering Firm Address, City, State, Zip

Contact Name Contact Telephone Email

Electrical Engineering Firm Address, City, State, Zip

Contact Name Contact Telephone Email

Title 24 Consultant Address, City, State, Zip

Contact Name Contact Telephone Email

INTEREST IN PARTICIPATION

I would like to participate in Pacific Gas and Electric Company's Customized Energy Efficiency Incentive program. I understand that the Incentive is funded by utility customers through the Public Purpose Programs surcharge. I am interested in improving the energy efficiency of my project using design assistance and the financial incentives available. I agree to provide the required documentation as requested. I am willing to consider efficiency recommendations which may improve the performance of my project significantly beyond 2008 Title 24 (or other baseline) requirements. I understand that participation is voluntary and that I am under no obligation to modify the design or construction of my building based on resulting recommendations. I also understand that I will receive financial incentives only if I complete an agreement, my eligibility is established by PG&E, the performance of my building meets the requirements, and the energy efficiency strategies are installed and verified.

Applicant (Customer/Building Owner) Name (please print) Title

Signature Date

FOR PG&E USE ONLY: Project No. _____ Application No. _____ Ref. No. _____



2013–2014 Program Application Energy Efficiency—Automated Demand Response Technology Incentive

SECTION 1 CUSTOMER CONTACT INFORMATION

PG&E Customer Name			
Mailing Address	City	State	Zip
Customer Contact Name	Title		
Contact Telephone Number	Contact Fax Number	Email	

SECTION 2 PAYEE INFORMATION

Tax Identification Type (select ONLY one) Federal Tax ID Employer ID Number (EIN) Social Security Number **Tax Identification Number:** _____

Tax Status (select ONLY one) Corporation Non-Corporation Individual Exempt

(For Retrofit projects only, if the payee is the same as the customer listed in Section 1, skip the following and go to Section 3. Reassignment of incentive payments to other parties is not applicable for New Construction projects.)

Payee	Telephone Number	Fax Number	
Mailing Address	City	State	Zip
Contact Name	Title	Email	

SECTION 3 PROJECT TYPE(S)

Non-residential

New Construction/Addition (attach Customized New Construction form)

Design Team (attach SBD—Design Team form, if applicable)

Renovation/Retrofit/Demand Response (attach Customize Retrofit/Demand Response form)

SECTION 4 AGREEMENT

I have read and agree to the terms and conditions on the following pages. I certify that the information I have provided on this application and attachment(s) is true and correct.

Customer Contact Name (please print)	Title
Signature	Date

[See Terms and Conditions on the following pages.](#)

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Project Manager Name	TM PM ID	
SS Rep Name	SS Rep ID	Rep Telephone Number
Service Code	Date Received	



2014 Automated Demand Response Application Form

ADR Calculation Page

Project Name _____ Vendor _____ Customer Contact _____

Customer Type Industrial Commercial Agricultural

AUTOMATED DEMAND RESPONSE DISPATCHABLE ON PEAK DEMAND REDUCTIONS MEASURE DETAILS [Enter data in blue boxes]

Technology Category 1: Semi Automated DR								
Measure #	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	Dispatchable On-Peak Demand Reductions (kW)	Technology Category Incentive Rate (\$/kW)	Gross Incentive (\$)	Incremental ADR Project Cost (\$)	Incentive Adjustment* (\$)	Final Incentive [†] (\$)
1				\$125				
2				\$125				
3				\$125				
TOTALS								

Technology Category 2: Automated DR								
Measure #	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	Dispatchable On-Peak Demand Reductions (kW)	Technology Category Incentive Rate (\$/kW)	Gross Incentive (\$)	Incremental ADR Project Cost (\$)	Incentive Adjustment* (\$)	Final Incentive [†] (\$)
1				\$200				
2				\$200				
3				\$200				
TOTALS								

Technology Category 3: Emerging & Advanced Technology HVAC								
Measure #	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	Dispatchable On-Peak Demand Reductions (kW)	Technology Category Incentive Rate (\$/kW)	Gross Incentive (\$)	Incremental ADR Project Cost (\$)	Incentive Adjustment* (\$)	Final Incentive [†] (\$)
1				\$350				
2				\$350				
3				\$350				
TOTALS								

Technology Category 4: Emerging & Advanced Technology Lighting								
Measure #	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	Dispatchable On-Peak Demand Reductions (kW)	Technology Category Incentive Rate (\$/kW)	Gross Incentive (\$)	Incremental ADR Project Cost (\$)	Incentive Adjustment* (\$)	Final Incentive [†] (\$)
1				\$400				
2				\$400				
3				\$400				
TOTALS								

Automated Demand Response On-Peak Demand Reduction Rates (key)			
	Technology Category	DR Program Enrollment Options	IncentiveRate
1	Semi-Automated DR	PDP, CBP, DBP, AMP, OBMC, or E-SLRP	\$125
2	Automated DR	PDP, CBP, DBP, or AMP	\$200
3	Emerging & Advanced Technology HVAC	PDP, CBP, DBP, or AMP	\$350
4	Emerging & Advanced Technology Lighting	PDP, CBP, DBP, or AMP	\$400

ADR Summary	
Dispatchable Peak Demand Reduction	kW
ADR Incremental Project Costs	\$
ADR Incentive: 60% Payment	\$
ADR Incentive: 40% Perf. Payment	\$

*Incentive limited to 100% of incremental ADR Project Cost

†Incentive Payments: Customers will receive 60% of the total program incentive after successful verification of equipment installation and testing of the committed DR strategies. The remaining 40% incentive will be paid upon verification of participant performance in the immediate following full DR season, which may be up to 12 months after the first payment. The second incentive payment is furthermore prorated based on a minimum performance of 60% of the verified kW curtailment averaged across all events called during the DR season.

Instructions

Select the Appropriate Forms

All customers must submit a Customized Energy Efficiency Incentive Application and at least one of the following project forms:

Non-Residential Projects

New Construction/Addition: Attach Customized New Construction Form

Design Team: Attach SBD—Design Team Form if applicable

Renovation/Retrofit/Demand Response: Attach Customized Retrofit/Demand Response Form

Automated Demand Response Program

The Technology Incentive (TI) program's objective is to provide cash incentive payments for the installation of equipment or control software supporting Automated Demand Response (ADR). By promoting enabling technologies, PG&E helps its customers keep California's energy grid operating under extreme conditions.

How to Apply

1. Read Terms and Conditions on:

- The back page of the Application
- The Project Form(s) that apply to your project(s)

2. Complete:

- Customer Information and Project Type on the Application
- (If applicable) Payment Section on the Application, if payment is to be paid to a party other than the Customer
- Project Information and any calculations required by the Project Form(s)

3. Sign:

- The Agreement on the Application
- (If applicable) The Payment Release Authorization on the Application, if incentive is to be paid to a party other than the Customer
- The Agreement(s) on your choice of Project Form(s)

4. Submit:

- The Application
- Your choice of Project Form(s)
- All required documentation pertaining to your project

Contact PG&E Before Submitting Your Information

You should contact a PG&E representative prior to submitting applications and other required documentation in order to participate in PG&E's Customized Energy Efficiency Incentive Program.

Contact the Business Customer Center at **1-800-468-4743**

Email: businesscustomerhelp@pge.com

Refer to the current Participation Handbook for requirements and guidelines.

Submit Application Package to
Your PG&E Representative or Mail
Application To:

PG&E Project Office Support Team
P.O. Box 7265
San Francisco, CA 94120-7265

For Overnight Delivery,
Send To:

PG&E Integrated Processing Center
Mail Code B3B
77 Beale Street—3rd Floor
San Francisco, CA 94105-1814

For Fax Delivery, Send To:

415-972-5155

By Email, Send To:

customizedapps@pge.com

Terms and Conditions

I, the Customer, agree to the following terms and conditions ("the Agreement"):

1. I meet the Customized Energy Efficiency Incentive eligibility requirements as stated in the appropriate attachment(s) included with this Application.
2. The information I have supplied on this Application and attachment(s) is true, correct, and complete.
3. I have read and understand the terms and conditions of the Agreement and on the appropriate attachments and agree to abide by the rules, requirements and terms set forth on this Application, the Agreement, and all attachments.
4. If the Agreement is terminated for any reason, Pacific Gas and Electric Company (PG&E) shall not be liable to the Customer for damages or compensation of any kind.
5. PG&E reserves the right to determine eligibility for the Incentive.
6. PG&E MAKES NO REPRESENTATION OR WARRANTY, AND ASSUMES NO LIABILITY WITH RESPECT TO QUALITY, SAFETY, PERFORMANCE, OR OTHER ASPECT OF ANY DESIGN, SYSTEM OR APPLIANCE INSTALLED PURSUANT TO THE AGREEMENT, AND EXPRESSLY DISCLAIMS ANY SUCH REPRESENTATION, WARRANTY OR LIABILITY. CUSTOMER AGREES TO INDEMNIFY PG&E, ITS AFFILIATES, SUBSIDIARIES, PARENT COMPANY, OFFICERS, DIRECTORS, AGENTS, AND EMPLOYEES AGAINST ALL LOSS, DAMAGE, EXPENSE, FEES, COSTS, AND LIABILITY ARISING FROM ANY MEASURES INSTALLED.
7. Both funding and the conditions of the Incentive are subject to the jurisdiction of the California Public Utilities Commission (CPUC) and shall be subject to such changes or modifications as the CPUC may, from time to time, direct in the exercise of its jurisdiction. If there are changes in the Incentive, PG&E will endeavor, but cannot guarantee, to provide a reasonable period of time before changes go into effect.
8. I understand that if the incentive is modified in any way or terminated by order of any government entity, then the Agreement shall be revised or terminated consistent with that order.
9. PG&E may assign the Agreement, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise, without the Customer's prior written consent, provided PG&E remains obligated for payments incurred prior to the assignment. The Customer may not assign this Application, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of PG&E.
10. I understand the Incentive requires inspections and measurements of the performance of the measures. Therefore, I agree to provide access to the Project Site for these purposes to PG&E and/or its agents or assigns and the CPUC and/or its agents or assigns.
11. I agree to release PG&E, its affiliates, subsidiaries, parent company, officers, managers, directors, agents, and employees from all claims, demands, losses, damages, costs, expenses, and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, including but not limited to employees of PG&E, customer, or any third party; (2) injury to property or other interests of PG&E, Customer or any third party; (3) violation of local, state, or federal common law, statute, or regulation, including but not limited to environmental laws or regulations; (4) energy savings shortfall; so long as such injury, violation, or shortfall (as set forth in (1)-(4) above) arises from or is in any way connected with the Project, including any third party's performance of or failure to perform the Project, however caused, regardless of any strict liability or negligence of PG&E, its officers, managers, or employees.
12. Energy savings for which incentives are paid cannot exceed the actual usage provided by PG&E. Non-utility supply, such as cogeneration or deliveries from another commodity supplier, does not qualify as usage from PG&E (with the exception of Direct Access customers or customers paying departing load fees for which the utility collects PPP or PGC charges).
13. Funding approved for this Incentive is limited and will be paid on a first-come, first-served basis to qualified customers. Funds will only be reserved upon PG&E's execution of the Agreement. This incentive offer is subject to the availability of authorized funds.
14. Installation of any energy-efficient equipment required for compliance with 2008 Title 24 will not qualify for incentives. Energy efficiency improvements beyond 2008 Title 24 requirements or a generally accepted industry standard, where applicable, may be eligible for incentives.
15. Specific restrictions may apply to each energy efficiency system, as outlined in the instructions and attached project forms.
16. To be eligible for incentives, I agree that I have not and will not apply for or receive incentives offered by local or state entities or other utilities for measures covered under this Agreement.
17. PG&E may suspend or terminate the Agreement, without cause, upon written notice to me.
18. I understand the following Tax Liability provisions: PG&E will report incentives greater than \$600 as income to me on IRS form 1099 unless: (1) I have marked the "Corporation" or "Exempt" tax status box, or (2) I identified a different party as "Payee" in Section 2 of the application.
19. I understand once an acknowledgement receipt is issued for this Application under a Customized Energy Efficiency Program, the Application will be processed under that Program. If the Application is withdrawn at any time in the process, I may only resubmit an Application for the same project in the same program, under specific circumstances approved by the Program Manager.

Terms and Conditions (continued)

20. For Customized Retrofit only: If Section 2 is filled out, as the customer, I am authorizing this payment of my incentive to the other entity named in Section 2 and I understand that I will not be receiving the incentive check from PG&E. I also understand that my release of the payment to the third party does not exempt me from the requirements outlined in the Application package.

21. For Customized Retrofit only: If Section "Project Sponsor Info" on the Customized Retrofit form is NOT filled out, I am self- sponsoring this project and intend to enter into a Customized Retrofit Agreement with Pacific Gas and Electric Company (PG&E) for delivery of energy and/or demand savings resulting from the installation of energy efficiency measures at the project site listed. I assume the role and responsibilities of the Project Sponsor.

I understand:

Authority: I have obtained the permission of the legal owner of the Project Site to install the measures.

Incentives: (1) To be eligible for incentives, a project application must be submitted and PG&E must inspect and approve the project prior to the removal of the existing equipment/systems and the installation of the measures; (2) the energy savings, incentives and installed costs are estimates only; (3) PG&E finalizes the incentive amounts after completing the project approval process. The actual incentive amount may therefore vary from the submitted amount.

22. For Customized Retrofit only: If Section "Project Sponsor Info" on the Customized Retrofit form is filled out, I have entered into a contract with the Project Sponsor indicated for the installation of energy efficiency measures at the project site listed. Upon project approval, the Project Sponsor will enter into a Customized Retrofit Agreement with PG&E for delivery of energy and/or demand savings resulting from the installation of these measures at the project site. All contracts and correspondence will be sent directly to the Project Sponsor specified.

I understand:

Authority: I have authority to contract, on behalf of the legal owner of the Project Site, for installation of the energy efficiency measures.

Project Sponsor: (1) PG&E makes no warranty or representation about the Project Sponsor's qualifications, and I am solely responsible for selecting the Project Sponsor to implement the project; (2) the Project Sponsor is an independent contractor and is not authorized to make any representations on behalf of PG&E; (3) PG&E will have no role in resolving any disputes between me, the Project Sponsor, and/or any other third parties.

Incentives: (1) To be eligible for incentives, a project application must be submitted and PG&E must inspect and approve the project prior to the removal of the existing equipment/systems and the installation of the measures; (2) the energy savings, incentives and installed costs are estimates only; (3) PG&E finalizes the incentive amounts after completing the project approval process. The actual incentive amount may therefore vary from the submitted amount.

For Automated Demand Response Only

Applicants Eligibility for ADR and Semi-DR: All non-residential customers who: (1) are not installing communicating thermostats project as a small or medium business; (2) receive electric service from PG&E; (3) have a PG&E interval meter installed at the site; (4) have an existing Utility service account with at least 12 months of billing and usage history; (5) pays the PPP surcharge on the electric meter on which the demand response and energy efficient equipment is proposed.

Technology Eligibility for Semi-ADR: Technology must have previously demonstrated Demand Response capability and technology must either (1) have been evaluated in a independent assessment; (2) be currently installed and available for evaluation by program staff at a site in PG&E territory or other location easily accessed by the program staff, and where both pre- and post-project conditions are documented or currently verifiable; (3) must be under manufacturer warranty for a minimum of three years.

Technology Eligibility for ADR: (1) Technology must have previously demonstrated Demand Response capability; (2) Technology must have been evaluated in an independent assessment; or be currently installed and available for evaluation by program staff at a site in PG&E territory or other location easily accessed by the program staff, and where both pre- and post-project conditions are documented or currently verifiable; (3) Technology must be under Manufacturer warranty for a minimum of three years; (4) For 2012, Technology must be either OpenADR-1.0 compliant or OpenADR-2.0 Certified; (5) For applications received after January 1, 2013, technologies must be OpenADR-2.0 certified.

Peak Demand Period—Weekdays 12:00 noon through 6:00 p.m. from May 1 through October 31 (excluding holidays).

Per CPUC Decision D.12-04-045, this program begins September 17, 2012.

