



2010 Customized Retrofit and Demand Response Form-State of California

SECTION 1 PROJECT INFORMATION

Project Name/Description	Name of PG&E Local Gov't/Statewide Partnership, if applicable		
Project Site Address	City	State	Zip
Contact Name at Project Site	Contact Phone Number	Contact E-Mail Address	
Project Site ID Number*	Electric Service ID Number	Gas Service ID Number	
Facility Description/Type	Years since built or last major renovation	Total Sq. Ft. of Facility	

Estimated Completion Date _____

*For multiple site applications, enter identifier for each site and PG&E Service ID # (not Account Number) on the savings summary sheet.

SECTION 2 PROJECT SPONSOR/VENDOR INFO

(If the customer is self sponsoring, skip to Customized Retrofit Form page 2 of 3)

Typically the project sponsor is a vendor who assists the customer in the purchase and installation of qualifying energy efficient equipment. Project sponsors serve as the primary point of contact and communications will be directed to them. The Vendor category includes vendors, installers, contractors and energy service companies.

Business Name of Project Sponsor			
Mailing Address	City	State	Zip
Project Sponsor Contact Name	Title		
Contact Telephone Number	Contact Fax Number	E-Mail Address	

I, the Project Sponsor, agree to follow all guidelines and procedures established in the 2010 Customized Retrofit Manual. The information I provided on this form is true and correct. Eligibility for receipt of any incentive payments is contingent on meeting these requirements.

Project Sponsor Name (Please Print)	Title
Signature	Date

Please continue on to page 2 of this form.

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



2010 Customized Retrofit Savings Summary- State of California

SECTION 3 ENERGY EFFICIENCY MEASURE INFORMATION

1. Indicate the Site Name and Site Service ID #.
2. Indicate the measure type by checking L for Lighting, AI for Air Conditioning and Refrigeration I (AC&R I), All for Air Conditioning and Refrigeration II (AC&R II), O for other, or G for Natural Gas.
3. Select the savings estimate type used to estimate the energy savings and demand reduction by choosing ES (energy savings estimation software) or EC (engineering calculations).
If you select ES, please attach all software print outs
If you select EC, please attach all calculations and formulas
4. Provide a brief description of the proposed measure.
5. Provide costs for each measure.

#	Calculated Measures Site Name (and site Service ID#, if multiple sites)	Measure Type	Savings Estimate	Description of the Proposed Measure	Retrofit Cost (\$)*
1		OL OAI OAII OO OG	OES OEC		
2		OL OAI OAII OO OG	OES OEC		
3		OL OAI OAII OO OG	OES OEC		
4		OL OAI OAII OO OG	OES OEC		

SECTION 4 ENERGY EFFICIENCY SAVINGS AND INCENTIVE SUMMARY

ENERGY/PERMANENT ON-PEAK DEMAND MEASURE DETAILS

Attach calculation sheets to this form and enter the energy savings and demand reduction parameters for Calculated Saving Measure below.

INCENTIVE RATES			
Lighting	\$0.15/kWh	Motors and Others	\$0.18/kWh
HVAC	\$0.24/kWh	Natural Gas	\$1.00/Therm

Energy Savings

Permanent On-Peak Demand Reduction

Calculated Measure from # above	Baseline Usage (kWh/yr or therm/yr)	Installed Usage (kWh/yr or therm/yr)	Energy Savings (kWh/yr or therm/yr)	Incentive Rate (\$/kWh or \$/therm)	Energy Incentive(\$)	Baseline On-Peak Demand (kW)	Installed On-Peak Demand (kW)	On-Peak Demand Reduction (kW)
1								
2								
3								
4								

Estimated Energy Savings Totals _____ kWh
 Total Project Cost (\$) _____
 On-Peak Demand Reduction _____ kW
Estimated Subtotal Incentive (\$) _____
 _____ therms
Project Cost Adjustment (\$) _____
Estimated Total Incentive (\$) _____

*The total project cost includes, but is not limited to, audits, design, engineering, construction, materials, permits, fees, overhead and labor. Written forms must have separate measure entries for each measure type included in the project. The total incentive cannot exceed 50% of the total project cost and the total site incentive cannot exceed the Project Site Cap for single site applications. An adjustment may be made after review of measure costs. Please provide project invoices upon project completion.

See 2010 Customized Retrofit Participant Manual for details.



2010 Dispatchable Peak Demand Reduction Summary - State of California

Project Name _____ Project Sponsor _____

DEMAND RESPONSE DISPATCHABLE PEAK DEMAND REDUCTIONS MEASURE DETAILS												
Measure #	Baseline Peak Demand (kW)	Installed Peak Demand (kW)	Dispatchable Peak Demand Reduction (kW)	Program Category	Incentive Rate (\$/kW)	Gross Incentive (\$)	Incremental DR Project Cost (\$)	Incentive Adjustment (\$)	Final Incentive (\$)*	Demand Response Peak Demand Reduction Rates		
										Program Category	Program Enrollment Options	Rate
1				○1 ○2								
2				○1 ○2						1	AMP, BIP, CBP, CPP & PeakChoice with committed load reduction	\$125/kW
3				○1 ○2								
4				○1 ○2						2	DBP & PeakChoice best effort options	\$50/kW
TOTALS												

Dispatchable Peak Demand Reduction	_____ kW
DR Incremental Project Costs	\$ _____
Demand Response Total Incentive	\$ _____

***DR Peak Eligibility** - Measures that reduce dispatchable demand on weekdays between 12:00 noon and 6:00 p.m. from May 1 through October 31 (excluding holidays) are eligible for Demand Response Incentives. The site must have a SmartMeter™ or a 15-minute interval meter. Meter readings will be taken at post-installation inspection to accurately determine the dispatchable on-peak load. Measure incentives are eligible for 50% of the incremental DR project costs up to \$50/kW or \$125/kW depending on DR program enrollment option.

An applicant's eligibility for DR - All commercial, industrial and agricultural customers who: 1) receive retail electric service from PG&E, 2) have had a maximum demand greater than or equal to 200kW per service agreement within the last 12 billing months, or have the ability to demonstrate a load reduction greater than or equal to 30 kW, and 3) have an existing electric meter that is capable of recording usage in 15 minute intervals and that can be read remotely by PG&E are eligible for participation as a customer.

A measure's eligibility for DR - Eligible DR measures include the installation of new retrofit equipment or control software that allows the customer to temporarily reduce or shift a site's on-peak load in response to a dispatch order. All incentive payments will be based on the Dispatchable On-Peak Load Reduction which is defined as existing average load that, upon request, could be temporarily reduced for the operation day's entire on-peak period or temporarily shifted from the operation day's on-peak period to the partial-peak or off-peak periods. Permanent load shifts and reductions, including but not limited to thermal energy storage, are not eligible. DR measures involving generation, co-generation, or fuel-switching are not eligible.

Incentive Payments for DR - Incentive payments will be made in installments at several points in the process, including after approval of the Installation Report (IR), load reduction verification, and Demand Response program enrollment. Please see the Technology Incentive (TI) Manual for more information.

Application must have Demand Reduction calculation sheets attached or application will be rejected. Calculation must include loads, load profiles, operating conditions, and any other relevant information.

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

Per CPUC Decision D.09-08-027, this program begins on January 1, 2010.

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SECTION 1 CUSTOMER CONTACT INFORMATION

PG&E Customer, California State Agency Name (The Customer)

Mailing Address City State Zip

Customer Contact Name Title

Contact Telephone Number Contact Fax Number E-Mail Address

SECTION 2 PAYEE INFORMATION

Tax Identification Type (Select ONLY One)

Employer ID Number (EIN)
 Federal Tax ID SSN _____
Tax Identification Number

Tax Status (Select ONLY One)

Corporation Individual
 Non-Corp Exempt

(If the payee is the same as the customer listed in Section 1, skip the following and go to Section 3.)

Payee Telephone Number Fax Number

Mailing Address City State Zip

Contact Name Title E-Mail

SECTION 3 PROJECT TYPE(S)

NONRESIDENTIAL

- NEW CONSTRUCTION/ADDITION (Attach Customized New Construction form)
 - DESIGN TEAM (Attach SBD-DT Form if applicable)
- RENOVATION/RETROFIT/DEMAND RESPONSE (Attach Customized 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

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_____|_____|_____|_____|_____|_____| Project Manager Name

_____|_____|_____|_____|_____|_____| SS Rep Name

_____|_____|_____|-_____|_____|-_____|_____|_____| Rep Phone #

Service Code Date Received

SEE TERMS AND CONDITIONS ON THE FOLLOWING PAGES

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

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 – DT Form if applicable

RENOVATION/RETROFIT/DEMAND RESPONSE – Attach Customized Retrofit/Demand Response Form

Demand Response Programs

The Technology Incentive (TI) program's objective is to provide cash incentive payments for the installation of equipment or control software supporting Demand Response (DR). 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.

Non Residential Projects:

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

Email: businesscustomerhelp@pge.com

Refer to the Participation Handbook for requirements and guidelines.

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

PG&E Integrated Processing Center
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

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. PG&E may suspend or terminate the Agreement, without cause, upon written notice to me. If the agreement is terminated by PG&E without cause, PG&E agrees to compensate the Customer for all pre-approved expenditures accrued up to the effective date of termination. PG&E shall not be liable to the Customer for damages or compensation of any kind in the event that PG&E is required to terminate in order to comply with applicable laws, regulations, or as directed by the CPUC.
5. PG&E reserves the right to verify eligibility for the incentive as determined in the project agreement.
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.
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, assigns, contractors or subcontractors, PG&E Contractors, and the CPUC and/or its agents or assigns. In the event a PG&E Contractor is coming onto the project site, PG&E agrees to provide the PG&E Contractor with the Customer's Right of Entry (ROE) form, attached hereto as exhibit A, to be executed in order to enter the Customer's property. Any modifications to the ROE shall be between the Customer and PG&E's Contractor. PG&E Shall not be bound by the ROE's terms and conditions.
11. The Parties acknowledge and agree that PG&E is only providing the State with money in the form of a rebate or incentive payment. The Customer has independently hired contractors ("State Contractors") to perform the work on behalf of the Customer to qualify for the incentive or rebate payment. The Customer acknowledges and agrees that the State Contractors are not third party beneficiaries to this agreement between the Customer and PG&E. To the extent authorized by law and subject to appropriation of the Legislature, the Customer agrees that it will look only to State Contractors for any claims related to the installed equipment or its performance and that PG&E shall have no responsibility or liability, except for the payment of the rebate or incentive, and the Customer shall indemnify PG&E for any claims made by the State Contractors against PG&E.
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 Public Purpose Program funds or Public Good funds).
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 will not apply for or receive incentives offered by local or state entities or other utilities for measures covered under this Agreement, that are funded by the Public Purpose Program (PPP) funds, the California Energy Commission (CEC) funds or the Public Goods (PGC) funds distributed by the CPUC.
17. 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.
18. 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.
19. 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.
20. 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 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.
21. 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.

