

Custom Rebate Program Application

Instructions for Use

All custom projects must receive pre-approval from the program BEFORE a purchase order is issued for materials and project installation begins. For detailed instructions, please refer to the terms and conditions on page 5 of this application. If you have any questions, please call **855-849-8928**.

Step 1: Determine Eligibility

Custom rebates are only made available to help influence and implement projects that otherwise would not be completed, or to complete projects sooner than currently or previously scheduled. **Customers must work with program representatives to determine if their project will qualify for a custom rebate and must obtain pre-approval prior to making a purchasing decision.** These projects are reviewed on a case-by-case basis for technologies based on their specific application and the facility in which they operate. Private facilities that are Peoples Gas or North Shore Gas customers with Service Classification 2 or higher are eligible to participate in this program. Service Classification 5 customers are exempt from participating in this program. **The program begins January 1, 2020 and expires December 31, 2020.**

Step 2: Complete an Application for Pre-Approval

Requests for pre-approval must be submitted to the program via one of the methods listed below and must include the following:

- a) The completed application with pre-approval signature and date.
- b) An itemized estimate from the chosen trade ally that includes a separate line item for each rebate measure, along with the quantity, size, type, make and model of proposed items, and labor costs, if applicable.
Note: Internal labor cannot be included in the cost of the project.
- c) A project summary containing:
 - Description of the project in one to two paragraphs.
 - All known factors and assumptions used in energy efficiency calculation.
 - Logical calculation of estimated energy savings, with units, preferably in a spreadsheet.
- d) The original equipment manufacturer (OEM) specification sheets for items to be installed as described in the application.

Step 3: Obtain Pre-Approval

In order to obtain approval, program representatives will work with the customer to schedule and complete pre- and post-inspections, an engineering review and required program documentation. If the project meets the pre-approval criteria, and Peoples Gas or North Shore Gas choose to move forward with the particular application, the rebate will be calculated. The rebate will be the lesser of: 1) Buy down to one-year payback, 2) \$0.75 per therm saved annually (projects ≤ 7,500 therms) or \$1 per therm saved annually (projects > 7,500 therms), 3) full incremental project cost, or 4) 50% of the total project cost. The customer will receive a letter via e-mail or standard mail indicating that funds have been reserved for the project. Incomplete applications will cause delays. The reservation letter must be signed and returned within seven (7) days.

Step 4: Install Equipment

After receiving the reservation letter, the customer has 90 days to install new equipment. Extensions may be requested in writing to the program address listed on page 1 of this application.

Step 5: Submit Final Application

Once work is complete, submit the final application with:

- a) The completed application with final application signature and date.
- b) An itemized invoice from the chosen trade ally that is addressed to the customer and includes a separate line item for each rebate measure, along with the quantity, size, type, make and model of installed items, and labor costs, if applicable. Payment released to the installing contractor must be shown as a credit on the invoice.
- c) Any documentation that describes changes in the project which were not previously communicated to the program.

APPLICANT SUBMISSION: Please submit the completed, signed application and required documentation one of three ways:

Option 1: Mail

Peoples Gas/North Shore Gas
Custom Rebate Program
5450 N. Cumberland Ave., Ste. 125
Chicago, IL 60656

Option 2: Scan and Email

Attn: Custom Rebate Program
For Peoples Gas customers:
peoplesgas@franklinenergy.com
For North Shore Gas customers:
northshoregas@franklinenergy.com

Option 3: Fax

Attn: Custom Rebate Program
773-853-2205

Applicant Information

Customer Account Name:				Contact Name and Title:			
Phone:				Email:			
Installation Address:				City:		State:	ZIP:
Mailing Address:				City:		State:	ZIP:
Domestic Water Heat:	<input type="checkbox"/> Natural Gas <input type="checkbox"/> Electric		Fuel Type for Space Heating:	<input type="checkbox"/> Natural Gas <input type="checkbox"/> Electric			
Natural Gas Utility:	<input type="checkbox"/> Peoples Gas <input type="checkbox"/> North Shore Gas		Utility Account Number:				
Customer Type:	<input type="checkbox"/> Multi-Family <input type="checkbox"/> Small Business <input type="checkbox"/> Commercial and Industrial						
Building Type:	<input type="checkbox"/> Office <input type="checkbox"/> Retail/Service <input type="checkbox"/> Warehouse <input type="checkbox"/> Manufacturing <input type="checkbox"/> Grocery <input type="checkbox"/> Healthcare/Medical <input type="checkbox"/> Non-Profit <input type="checkbox"/> Multi-Family <input type="checkbox"/> Religious Facility <input type="checkbox"/> Hotel/Motel <input type="checkbox"/> Restaurant <input type="checkbox"/> College/University <input type="checkbox"/> K-12 School <input type="checkbox"/> Other: _____						
Is your business classified as any of the following?	<input type="checkbox"/> Women-owned <input type="checkbox"/> Minority-owned <input type="checkbox"/> Veteran-owned						

Installing Trade Ally Information

Complete this section unless the proposed project is to be self-installed.

Business Name:				Contact Name and Title:			
Phone:				Email:			
Mailing Address:				City:		State:	ZIP:
Is your business classified as any of the following?	<input type="checkbox"/> Women-owned <input type="checkbox"/> Minority-owned <input type="checkbox"/> Veteran-owned						

Certifications and Signature

Please sign and complete information below. Customer signature is required for payment. I hereby certify that:

- 1) The information contained in this application is accurate and complete;
- 2) All rules of this rebate program have been followed;
- and 3) I have read and understand the terms and conditions included within this document.

Submitted for Pre-Approval:

Pre-Approval Signature*:			
Print Name:		Date Submitted:	

*A pre-approval signature authorizes the program team to complete the energy savings calculations required to determine a rebate. This does not obligate a customer to implement the proposed project.

Submitted for Final Approval:

Final Application Signature:			
Print Name:		Date Submitted:	

OPTIONAL Payment Release Authorization

Complete this section ONLY if the rebate payment is to be paid to a third party. If payment is released to a trade ally, rebate must be shown as a credit on the customer invoice. I am authorizing the payment of the rebate to the third party named below, and I understand that I will not be receiving the rebate payment. I also understand that my release to a third party does not exempt me from the program requirements outlined in the terms and conditions.

Check Made Payable to (Trade Ally/Company/Individual):					
Contact Name:				Contact Phone:	
Mailing Address:					
City:			State:		ZIP:
Customer Signature:				Date:	
Print Name:					

Custom Project Description

Provide a thorough summary of the proposed project below. Column A must include a detailed summary of the proposed natural gas efficiency project at the customer location. Attach additional documents as necessary. For a list of commonly implemented custom projects and suggested documentation, please see the Program Specifications section below. Column B refers to the estimated therms to be saved by the proposed project. Column C refers to the financial savings resulting from the proposed project to include, but not limited to, savings from energy reduction. Column D refers to the total project cost to replace the existing operational equipment or is the incremental cost to upgrade non-operational equipment from standard to high-efficiency units. Includes contracted labor costs, disposal, permit fees, etc. Internal labor cannot be included in the cost. Column E provides the estimated completion date of the proposed project.

A	B	C	D	E
Project Summary	Estimated Energy Savings (Therms)	Estimated Project Savings (\$)	Estimated Project Cost (\$)	Estimated Completion Date

Peoples Gas and North Shore Gas Influence Survey

How did you hear about the Peoples Gas and North Shore Gas Energy Efficiency Programs? Check all that apply.

- Customer mailing/email information
- Program team
- Other: _____
- Program team site assessment
- Case studies
- Program trade ally referral
- Presentation

Please describe how the Peoples Gas and North Shore Gas Energy Efficiency Programs team provided assistance to help you overcome project barriers. Check all that apply.

- Provided Engineering or Gas Optimization Study
- Provided Staffing Grant
- Provided incentive to reduce project payback
- Assisted with savings calculations
- Assisted with paperwork and filling out program application
- Provided savings estimate showing project value
- Conducted site assessment
- Provided ROI calculation
- Provided support to customer's energy team
- Provided vendor contacts for project scoping
- Worked with vendors to refine project scope/costs
- Reviewed vendor's project estimates

Please elaborate:
 (e.g., payback period without the rebate is too high and project would likely not move forward)

Program Specifications

Custom rebates are available for projects that do not fit the description of our standard prescriptive application forms. Rebates are calculated on a case-by-case basis for technologies based on their application and the facility in which they operate. For custom rebates, customers must work with a program representative to determine if their project will qualify for a rebate and then obtain approval (in the form of a reservation letter) prior to making a purchasing decision. To help expedite the pre-approval process, we have provided required information, specifications and submittals for several common custom projects. If you have any questions, please call 855-849-8928.

- Industrial/Process Pipe, Valve, Fitting or Tank Insulation

- **Specifications:** A steam/condensate pipe, valve, fitting or tank survey must be completed and attached to the rebate application. Survey must contain all information required to compute savings using 3E Plus software including: hours of operation, pipe size, pipe length, fluid temperature and/or pressure, insulation type and thickness. Sample survey forms are available via request from the program. Areas in which new insulation is being installed must be identified as conditioned space, unconditioned space, semi-conditioned space or outside. To expedite processing, provide estimated therms savings through 3E Plus software.

- Boiler Combustion Management Upgrades

- **Specifications:** The rebate applies to natural gas, forced draft boilers only. Rebates are not eligible for upgrades to 100% backup or redundant systems. Describe the existing boiler and burner, including existing turndown, MBH input, existing modulation and reset schedule. Detail the combustion management upgrades to be performed (e.g., linkageless controls, O₂ trim controls, high turn down burner installation) and the associated MBH input. List the number of boilers supplying the system and identify redundant or backup boilers.
- For systems with multiple active boilers, list conditions or outside temperatures at which additional boilers come online (e.g., "at 30°F the 2nd boiler is typically activated to satisfy demand"). Describe boiler end uses (e.g., space conditioning, process or both and estimate of average load). Describe any boiler cycling that occurs throughout the year (e.g., number of cycles per hour and conditions under which cycling occurs). New equipment shall have a minimum 6:1 turndown. Steam boilers need pressure set points.

- Provide combustion efficiency test reports (with data at all firing positions) with application.

- Linkageless Controls Specifications (>20,000 MBH): Linkageless controls must allow for efficient tuning at all firing rates. Burners rated for less than or equal to 20,000 MBH are eligible for prescriptive linkageless controls rebates.
- O₂ Trim Controls Specifications: O₂ trim controls must monitor combustion and maintain 3% excess oxygen at high firing rates and 4% excess oxygen at low firing rates.
- High Turndown Burner Specifications: High turndown burners must provide a minimum 8:1 turndown ratio (boiler load of 12.5%).

- Destratification Fans

- **Specifications:** Provide an assessment of current temperature gradient in the facility with temperature readings at the floor, ceiling and minimum 10' intervals. Describe the thermostat locations (e.g., 10' above floor), facility schedule, standard thermostat settings and setbacks. Describe the means of providing space heating to the facility (e.g., AHUs, unit heaters) with equipment details. Include details on the existing roof construction and insulation.

- HVAC Optimization (e.g., DCV, VAV, temperature setbacks, operating schedule adjustments, reheat requirement reduction and guest room energy management)

- **Specifications:** Describe the facility and operating schedule, standard thermostat settings, and setbacks. Space conditioning must currently be done through gas fired equipment. Describe the means of providing space heating to the facility (e.g., AHUs, fan coil units and unit heaters) with equipment details including existing and proposed supply CFM, temperature set points and setback schedules for temperature and/or ventilation. Provide a brief description of the changes in sequences of operation that generate savings.
- **Demand-Controlled Ventilation–Parking Garage Specifications:** Conditioned space must be kept above 50°F during operating hours. System must currently meet code ventilation requirements and have continuous operation. Carbon monoxide sensors must be installed. VFD's must be installed on supply and return/exhaust fans. Fresh air intake and exhaust shall modulate to control carbon monoxide levels in the garage.
- **Demand-Controlled Ventilation–Conditioned Space (Interior) Specifications:** Conditioned space must be kept above 65°F during occupied hours. System must currently meet code ventilation requirements. Carbon dioxide sensors must be installed in conjunction with fully functioning economizers with zone level sensors or return system sensors. AHU OA damper shall modulate to match the occupancy fresh air demands of the space.
- **Guest Room Energy Management (GREM):** The GREM must have room temperature set points controlled by automatic occupancy detectors or keycard that indicates the occupancy status of the room. During unoccupied periods the default setting for controlled units must differ by at least 5°F from the operating set point. Specify the equipment providing space heating to the units. Provide information regarding source of outside air ventilation (e.g., makeup air unit; brought through PTAC unit).

- Ozone Laundry (hospitals and laundromats)

- **Specifications:** Provide information regarding laundry capacity (lbs), hours of operation and capacity usage rates/schedules in order to determine annual pounds of clothes washed per year. Detail current and proposed hot water set points. Specify source or efficiency of hot water. Other building types should see the prescriptive application to apply for rebates.

Terms and Conditions

1. **Rebate Offer:** Custom rebates will not be provided for projects with less than a one-year simple payback or greater than a seven-year simple payback. Projects must result in reduced natural gas energy use due to an improvement in system efficiency; control upgrades may also qualify. Reduced natural gas use resulting from fuel switching, power generation or renewable energy will not qualify. Equipment must be installed and operational on or after January 1, 2020 and on or before December 31, 2020.
2. **Eligibility:** Equipment must be new and installed in a private facility that is a Peoples Gas or North Shore Gas Customer ("Customer") with Service Classification 2 or higher (Service Classification 5 Customers are exempt from participating in this program), as well as meet minimum requirements set forth in this document.
3. **Compliance:**
 - All projects must comply with the applicable federal, state, and local laws and regulations, including building codes.
 - All equipment must be new or retrofitted with new components which meet program specifications. Used or rebuilt equipment is not eligible for rebates. Existing equipment must be removed or permanently disconnected.
 - Existing equipment must be operational when the final application is submitted.
 - Only one rebate will be granted for each project.
 - If the project is in a leased building, the term of the lease must be at least three (3) years and a lease agreement may be requested. For Custom projects with a payback of less than three (3) years, the lease must meet or exceed the payback period of the project.
4. **Delivery:** Applications must be delivered one of three ways:
 - Mailed to: Peoples Gas/North Shore Gas
Custom Rebate Program
5450 N. Cumberland Ave., Ste. 125,
Chicago, IL 60656
 - Emailed to: peoplesgas@franklinenergy.com or
northshoregas@franklinenergy.com
 - Faxed to: 773-853-2205
5. **Pre-Approval Applications:** Pre-approval applications must have complete information and be submitted with:
 - The completed application and agreement with pre-approval signature and date. Check the pre-approval box.
 - The original equipment manufacturer (OEM) specification sheets for all items to be installed as described in the application.
 - An itemized estimate from the installing trade ally and/or vendor for the project which includes a separate line item for each rebate measure, including the quantity, size, type, make and model of proposed items, and labor costs, if applicable.
 - Note: Internal labor cannot be included in the cost of the project.
6. **Final Applications:** Final applications must be submitted with:
 - The completed application and agreement with final application signature and date. Check the final application box.
 - An itemized invoice from the installing trade ally and/or vendor for the project that is addressed to the customer and includes a separate line item for each project measure, and includes the date, quantity, size, type, make and model of installed items, and labor costs, if applicable. Payment released to the installing trade ally must be shown as a credit on the invoice.
 - Any documentation for changes in the project which were not previously communicated to the program.
7. **Custom Rebate:** Purchase and install qualifying equipment and receive energy efficiency rebates of up to \$500,000 per Peoples Gas Customer or \$100,000 per North Shore Gas Customer per year. Multi-Family Customers can receive rebates up to \$50,000 per program year. Rebates for custom projects may not exceed 50% of the total project cost, including materials, external labor, permits, equipment rental, and disposal.
8. **Payment:** Once completed paperwork is submitted, rebate payments are usually made within 30 days. Payments may only be made to the Customer or qualified trade ally. Incomplete applications will either delay payments or result in denial of application approval. Peoples Gas or North Shore Gas reserves the right to refuse payment and participation if the Customer or the trade ally violates program terms and conditions.
9. **Inspection:** Program staff is required to conduct pre-inspections and post-inspections of installed projects.
10. **Tax Information:** Rebates may be subject to federal and/or state income tax reporting. Applicant is responsible for contacting a qualified tax advisor to determine tax liability. Peoples Gas or North Shore Gas is not responsible for any tax liability imposed on the Customer as a result of the payment of rebates.
11. **Publicity:** Peoples Gas and North Shore Gas reserves the right to publicize your participation in this program, unless you specifically request otherwise.
12. **Program Discretion:** Rebates are available on a first-come, first-served basis. Rebate amounts and offerings are subject to change or termination without notice at the discretion of Peoples Gas and North Shore Gas.
13. **Logo Use:** Customers or allies may not use the Peoples Gas and North Shore Gas program name or logo in any marketing, advertising, or promotional material without written permission.
14. **Disclaimers:** The Customer will defend, hold harmless, and release The Peoples Gas Light and Coke Company and North Shore Gas Company and each company's affiliates, officers, directors, shareholders, agents, employees, contractors, and representatives from any and all claims, liabilities, fines, interest, costs, expenses, and damages (including attorneys' fees and court costs) incurred by the Customer or its contractors or any third party for any damage, injury, death, loss, or destruction of any kind to persons or property, to the extent the damage, injury, death, loss, or destruction arises out of, or is related to, the acts or omissions of Peoples Gas or North Shore Gas or either company's affiliates, officers, directors, shareholders, agents, employees, contractors, or representatives or to the rebate program. Neither Peoples Gas nor North Shore Gas endorses any particular manufacturer, product, labor, or system design by offering these programs.

NEITHER PEOPLES GAS NOR NORTH SHORE GAS EXPRESSLY OR IMPLICITLY WARRANTS THE PERFORMANCE OF ANY EQUIPMENT OR ANY TRADE ALLY'S QUALITY OF WORK. NO WARRANTY OF ANY KIND, WHETHER STATUTORY, WRITTEN, ORAL, OR IMPLIED (INCLUDING WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE OR MERCHANTABILITY) WILL APPLY.

Contact your trade ally or equipment supplier for any warranties.
15. **Release of Customer Information:** Customer agrees to the release by Peoples Gas or North Shore Gas of any Customer data, including personally identifiable information, to any trade ally or other vendor providing services or support under the program.
16. **Verification:** Any Customer receiving a rebate check may be contacted by an evaluator to verify service/equipment installation or be asked to complete a Customer survey.