

About This Application

UGI Electric offers incentives for cost-effective custom energy efficiency improvements to help businesses reduce energy use by improving the efficiency of their equipment and facility. All UGI Electric commercial and industrial customers are eligible to participate. All custom projects must receive pre-approval from the Program Team BEFORE a purchase order is issued for materials and project installation begins. If you have any questions, please call 262-999-2613.

How To Apply

1 VERIFY ELIGIBILITY

- Applicant must verify that they are a business customer of UGI Electric (commercial, industrial, governmental, institutional, and non-profit). Multifamily applicants on a commercial rate may also apply.
- Project must be a new facility improvement that results in an improvement in electric energy efficiency and/or a permanent reduction in electric energy usage.
- All equipment must meet or exceed the specifications given in the application and be installed in facilities served by UGI Electric, with a valid UGI Electric account number.
- Projects must save electricity and be cost-effective under the UGI total resource cost test.

2 GET PRE-APPROVAL

- Application must be submitted for pre-approval to the Program Team before you purchase equipment for which the incentive is being requested.
- Complete the pre-approval application package (see Required Documents). You may submit the application via e-mail.
- A pre-installation inspection is required on all projects.
- You will receive a pre-approval letter stating that your project has been approved along with the approximate incentive amount.

3 COMPLETE YOUR PROJECT

- After receiving pre-approval, program participants must submit a completed application within 180 days of the measure's installation date.

4 GET YOUR REBATE

- Notify the Program Team that the project is completed and submit a final application package (see Required Documents) within 180 days of the measure's installation date. The final application is the same form as the pre-approval application.
- The Program Team will review your final application, and will perform a final post-installation inspection of all projects.
- The Program Team will mail the incentive check 4 to 6 weeks after the final application is approved.

Required Documents

PRE-APPROVAL

1. Completed and signed application
2. Incentive Worksheets as appropriate - Lighting Inventory Worksheet, Motors & VFD Worksheet or Custom Worksheet)
3. Documentation of existing equipment and equipment specifications (cut sheets) for proposed equipment
4. Project scoping document (proposal, quote, estimate)
5. IRS Form W-9 for the party receiving payment
6. Copy of the customer's UGI Electric bill

FINAL APPROVAL

1. Completed and signed Final application
2. Itemized project invoice(s) with labor and material breakdown
3. Final Worksheets, if changes required
4. Final equipment specifications (cut sheets), if changes required

Contact Us

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Application

Applicant Information

Customer Account Name:					UGI Account Number:					
Phone:					Email:					
Installation Address:					City:		State:		ZIP:	
Mailing Address:					City:		State:		ZIP:	
Contact Name:					Title:					
Business Type:	Commercial and Industrial	Government/Municipal School	Non-Profit	Other						
Building Type:	Office Facility	Retail/Service Hotel/Motel	Warehouse Restaurant	Manufacturing College/University	Grocery K-12 School	Healthcare/Medical Other:	Non-Profit	Multi-Family	Religious	
Project Type:	Retrofit	New Construction				Square footage of building affected by project:				
Domestic Water Heat:	Natural Gas	Electric				Fuel Type for Space Heating:	Natural Gas	Electric		

Installing Contractor Information

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

Business Name:										
Contact Name:					Contact Title:					
Phone:					Email:					
Mailing Address:					City:		State:		ZIP:	
Contact Name:					Title:					

Payment Release Authorization To Third Party

Complete this section ONLY if the incentive payment is to an entity other than the UGI account holder listed on the Application Information.

I am authorizing the payment of the incentive to the third party named below and I understand that I will not be receiving the incentive payment from Franklin Energy on behalf of UGI. I also understand that my release to a third party does not exempt me from the program requirements outlined in the measure specifications and Terms and Conditions.

Customer Signature:					Print Name:				Date:	
Check Made Payable to (Contractor/Company/Individual):										
Contact Name:					Contact Phone:					
Mailing Address:					City:		State:		ZIP:	
Federal Tax ID #					Tax Status:					

Application

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 the Custom Incentive program have been followed.
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 program staff 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 Approval Signature:			
Print Name:		Date Submitted:	

Worksheet

GENERAL REQUIREMENTS

All Custom projects are individually evaluated for cost-effectiveness, therefore, it's important that both the baseline and proposed conditions are accurately described along with the energy and demand usage and total costs. Please follow the instructions associated with the 2021 TRM based on end-use type below:

Lighting – 2021 TRM Appendix C should be used to provide a space by space inventory of existing and proposed equipment along with total costs. Savings will be calculated based on inputs.

Motors & VFDs – 2021 TRM Appendix D should be used to provide an inventory of existing and proposed equipment along with total costs. Savings will be calculated based on inputs.

Other Custom measures – complete the Project Overview and Custom Incentive Worksheet below.

CUSTOM PROJECT OVERVIEW AND INSTRUCTIONS

Project Overview

Describe the project scope of work, including a basic description of the facility, its functions, location of affected equipment and typical operating hours. Describe how the Base Case and Proposed inputs (usage, hours, and load) were calculated. Attach additional sheet if needed.

Existing System or Base Case Description

For retrofit projects, describe the existing system or equipment that will be modified under this application and state how the current system is operating. For new construction and end-of-life replacement projects, applications should provide information for the base efficiency system or equipment including:

- Detailed description of the affected equipment including system capacity, age, load profiles, production rate and hours of operation.
- Number of existing units.
- Manufacturer data sheets with equipment performance ratings (BHP, CFM, PSI, kW, etc.). Provide nameplate data if manufacturer data sheets are unavailable.
- Part load performance data, where applicable.
- Description of controls and sequence of operations.

Proposed System Description

Describe the high efficiency system or equipment in detail including:

- Operating conditions and hours of operation.
- Manufacturer data sheets for the equipment or performance ratings (BHP, CFM, PSI, kW, etc.).
- Description of controls and sequence of operations.
- One-line diagram, where applicable.

Project Overview *(Attach additional notes if more space is needed.)*



Worksheet

CUSTOM INCENTIVE WORKSHEET

Note: Incentives calculated based on \$0.08/kwh for UGI Electric small business customers and \$0.05/kwh for UGI Electric large business customers. Not to exceed 50% of the total incremental project cost borne by the customer. Total incentives will be limited to \$100,000 per customer per calendar year. Valid through May 31, 2023.

For each energy conservation measure (ECM), enter the end use type, energy impacts and cost estimates in the table below. Attach a measure by measure summary of the calculated energy and demand impacts associated with the ECM. Clearly indicate all assumptions and variables used in the analysis, including engineering formulas and documentation of all factors, values and assumptions used in the formulas (Microsoft Excel spreadsheet preferred). For retrofits, only enter the equipment and installation costs for the proposed system or equipment, including written proposals or quotes from vendors and contractors or itemized estimates of components from up to date estimating manuals. For new construction or end of life replacement projects, include cost data for both the base and proposed efficiency systems or equipment.

ECM 1 END USE TYPE:					
	Annual Energy (kWh)	Peak Demand (kW)	Equipment Cost	Installation Cost	Total Cost
Baseline					
Proposed					

*ECM end use type is either Lighting, HVAC, Refrigeration, Motors and Drives, Compressed Air or Other

ECM 2 END USE TYPE:					
	Annual Energy (kWh)	Peak Demand (kW)	Measure Cost	Installation Cost	Total Cost
Baseline					
Proposed					

*ECM end use type is either Lighting, HVAC, Refrigeration, Motors and Drives, Compressed Air or Other

Terms and Conditions

- ELIGIBILITY:** Incentives are available for commercial and industrial customers of UGI Electric "UGI" for the purchase and installation of qualifying energy efficiency measures in the UGI Electric service territory. UGI reserves the right to deny any application that may result in UGI exceeding its program budget. Incentives are offered on a first come first serve basis and applications must be post marked by May 31, 2023.
- INCENTIVES:** All projects must save electricity and be cost effective under the UGI total resource cost test. Custom incentives will be calculated by the Program Team based on \$0.08 per annual kWh saved for UGI Electric small business customers and \$0.05/kwh for UGI Electric large business customers. Not to exceed 50% of the total incremental project cost borne by the customer. Incentives will be capped at \$100,000 per customer, per calendar year. Each application shall be limited to one UGI account. Program participants must submit a completed application within 180 days of the measure installation date. Projects that do not meet this requirement will not be eligible for incentives. Multiple applications for different accounts may be submitted and will be evaluated individually by the Program Team.
- APPROVAL AND VERIFICATION:** Pre-approval from the Program Team is required on all Custom applications prior to the purchase and installation of equipment. Program participants must submit a completed application within 180 days of the measure's installation date. The Program Team reserves the right to verify sales transactions and to have reasonable access to your facility to verify the information provided in the application and after the installation of newly installed equipment prior to issuing incentives.
- PROJECT DOCUMENTATION REQUIREMENTS:** Applicant must provide the Program Team with the documentation as listed in the General Requirements (page 3). If Applicant does not provide the required project documents at pre-approval and payment stages, the project may be disqualified from the program. Annual electricity savings must be calculated using the 2021 TRM which is the industry accepted engineering algorithms and simulation model for both the existing and proposed equipment. The applicant must provide all assumptions used in the calculations and document the source for these assumptions.
- PROOF OF PURCHASE:** An itemized invoice must be submitted indicating the full project costs (material and labor), date of purchase, the size, type, make, model, serial number, part number and/or equipment manufacturer specification sheets.
- COMPLIANCE:** All projects must comply with all federal, state and local, laws, rules, regulations and codes, as applicable. All equipment must be new. Used or rebuilt equipment is not eligible. Existing equipment must be removed and disposed in a proper and legal manner.
- PAYMENT:** The Program Team will authorize payment upon application's final review and approval. The incentive check will be mailed within 4-6 weeks after the project receives final payment approval. Utility bill credits are not available. The Customer may assign the incentive payment to a designated third party.
- TAX INFORMATION:** The benefits/payments awarded through participation in this program may be taxable by the federal, state, and local government. The customer is responsible for declaring and paying all such taxes. The party receiving the incentive payment must complete IRS Form W-9 and submit it to the Program Team with the incentive application materials.
- APPLICATION DOES NOT ENTITLE CUSTOMER TO PARTICIPATE:** The program described in this application may be altered, suspended, or canceled by UGI at any time without prior notice. Under such circumstances, the customer is not entitled to any program benefits in excess of those approved prior to such action by the Program Team. Submission of a completed application does not entitle the customer to program participation. Entitlement to program participation can only occur after the Program Team has signed a copy of the application and granted pre-approval.
- PUBLICITY:** UGI reserves the right to publicize the Customer's participation in this program.
- NO WARRANTIES:** UGI does not endorse, guarantee, or warrant any manufacturer, contractor, product, equipment, system design, application, or workmanship. UGI is not responsible for the accuracy, completeness, or usefulness of any information, estimated savings or benefits attributed to the custom projects that qualify for this program. Reference to any specific product, project, or service by manufacturer, trade names, trademark or otherwise does not constitute or imply UGI's endorsement or recommendation. UGI is not responsible if a contractor or manufacturer provides inaccurate information to the applicant about the amount, terms and/or conditions of the actual incentive. UGI will not pay incentives for any custom project that is mislabeled or misrepresented regarding incentive qualifications.
- LIMITATION OF LIABILITY:** UGI's sole liability is limited to paying the properly qualified incentives specified herein. UGI shall not be liable to the customer or any other party for any damages whatsoever, including, without limitation, indirect, consequential or incidental damages, regardless of the theory of recovery, caused by or arising from any activities associated with this program.
- CHANGES TO THE PROGRAM:** UGI may change the program and the Terms & Conditions at any time without notice. Pre-approved applications, however, will be processed to completion under the Terms & Conditions in effect at the time of the pre-approval by UGI.