



INCENTIVE APPLICATION INSTRUCTIONS & INFORMATION

At any time, Hawai'i, Honolulu and Maui County electric utility ratepayers may contact Hawai'i Energy to discuss a project, get assistance in preparing an application, or with any program-related questions.

ELIGIBILITY:

Projects must be pre-approved in accordance with eligibility checklist (see checklist on subsequent page).

PROJECT REQUIREMENTS:

Hawai'i Energy incentivizes the actions of building owners to evaluate the effectiveness and efficiency of current building systems to optimize performance. These actions will be documented in a Commissioning Report that shall include:

- Executive summary of all activities included in the commissioning process.
- Introduction section, including names and contact information for the Building Owner, Building Manager, RCx Trade Ally.
- Detailed building and energy systems description, including estimates of the equipment usage profiles.
- Detailed operational scheduling of the major systems.
- Detailed report of all optimization measures identified
- Cost estimate, energy savings estimate and simple payback for all recommended operational actions, sequencing, and equipment enhancements.
- Pre- and post-data logging.
- Testing and Balancing (TAB) of HVAC system.
- Functional testing of the EMS, if equipped.
- Detailed operations and maintenance review.
- Documentation of O&M refresher training for facility staff.
- Assessment of existing equipment over-sizing and recommendations for right-sizing when HVAC equipment needs replacement, including, but not limited to recommended capital items.

APPLICATION PROCESS:

- Applicants must complete the Recommissioning / Retrocommissioning Incentive Application and submit all supporting documents such as layouts, drawings, technical attachments, and/or vendor literature. A completed and signed application is needed to obtain program pre-approval. **Program pre-approval is required prior to the start of any energy consumption analysis.**
- Mail, fax or email application & supporting documentation to: Hawai'i Energy
1132 Bishop Street, Suite 1800
Honolulu, HI 96813
Fax: (808) 441-6068 • Email: HawaiiEnergy@leidos.com
- The program will review the completed application and contact the applicant if further information or clarification is required. Upon pre-approval, the applicant will receive a written pre-approval notice from the program and work may then begin.

FEDERAL TAX ID OF APPLICANT/TAXABILITY:

As part of the incentive application process, Hawai'i Energy is required to comply with IRS reporting requirements. In order for the program to meet these requirements, you will need to submit IRS form W-9 with your application. It is understood that based on your tax status and rebate amount, you may receive IRS Form 1099 from Hawai'i Energy showing tax eligible rebate/incentive amounts.

QUESTIONS:

For questions, call the Business Program at 839-8880 (O'ahu) or toll-free at (877) 231-8222 (Neighbor Islands).



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ELIGIBILITY CHECKLIST:

Program pre-approval is required prior to the start of any energy consumption analysis. Projects can be whole building or by system if determined cost-effective by Hawai'i Energy. Eligible program participants must:

- Own or operate a high energy usage facility that has at least 50,000 square feet of conditioned space or that consumes at least 1,000,000 kWh/year.
- Receive electric service from Hawaiian Electric Companies (e.g., HECO, MECO or HELCO) and pay a Hawai'i public benefits fund surcharge on their electric bill.
- For retro-commissioning, building has been in service for at least 2 years and has never been commissioned before. For re-commissioning, it has been at least 5 years since the last commissioning activity.
- Be willing to commit up to 100% of the incentive value to implement energy conservation measures (ECMs) found to have a 2-year or less payback. Any implemented ECMs are eligible for Hawai'i Energy's prescriptive and custom incentives.
- Grant Hawai'i Energy access to their facility's billing data and other required data to establish an initial benchmark rating via ENERGY STAR Portfolio Manager®.
- Grant Hawai'i Energy access to the facility itself for on-going program assessment, monitoring and measurement purposes.
- Be willing to invest facility management time, typically between 8-16 hours, to support multiple site visits and data requests from the RCx consultant.
- Perform at least two weeks of metering of all major building systems prior to the implementation of any ECMs and at least two weeks of post metering. The cost of "pre" and "post" metering may be included in the total project cost by the commissioning agent. The metering plan shall be included in the proposal.
- The participant's commissioning specialist shall be certified by a nationally recognized building commissioning organization such as the American Society of Heating, Refrigeration and Air Conditioning Engineers (ASHRAE), AABC Commissioning Group (ACG), Building Commissioning Association (BCA), National Environmental Balancing Bureau (NEBB) or similar organization acceptable to Hawai'i Energy.
- If participant wishes to use a non-certified contractor to perform the Retro-Commissioning or Enhanced Commissioning project, an exception may be granted at Hawai'i Energy's sole discretion if:
 1. The proposed contractor provides evidence of having completed similar commissioning projects for two or more buildings of at least 50,000 square feet (conditioned space) each, and
 2. The proposed contractor submits at least two verifiable and satisfactory references from customers or clients who used the contractor to complete the similar projects.
- All retro-commissioning work performed (to include, but not limited to, documentation and reporting) must follow guidelines recommended by an approved commissioning organization. The commissioning specialist must indicate in their report the organization's guidelines which were followed for the retro-commissioning process.
- The cost of replacement of major end use items may be included in the total project cost from the commissioning agent. Cost of routine maintenance activities identified by the commissioning agent shall not be included in the total project.

Hawai'i Energy reserves the right to review all materials that result from a program-supported re-commissioning or retro-commissioning study including, but not limited to, final reports, consultant recommendations and metered data.



Hawai'i Energy

RECOMMISSIONING/RETROCOMMISSIONING INCENTIVE APPLICATION

EFFECTIVE JULY 1, 2017 THROUGH JUNE 30, 2018 OR WHILE FUNDING LASTS.

STEP 1: FILL OUT UTILITY ACCOUNT INFORMATION (ALL FIELDS MUST BE COMPLETED).

Company Name:	Property/Building Name:	Account Number: -----	<input type="checkbox"/> HECO
Contact Person:	Title:		<input type="checkbox"/> MECO
Email:	Phone:	Fax:	<input type="checkbox"/> HELCO
Project Address:	City:	State:	Zip:
Mailing Address (if different from above):	City:	State:	Zip:
Federal Tax ID of Applicant: (Complete Third Party Payment Section if payment is not to Utility Account Holder)			
Incentive Check to be paid to this Payee:			
<input type="checkbox"/> Account Holder at Installation Address <input type="checkbox"/> Account Holder at Mailing Address <input type="checkbox"/> Third Party (If checking this box, please complete the information below.)			

STEP 2: AUTHORIZATION FOR THIRD PARTY PAYMENT

Payable to:	Contact Name:
Mailing Address:	
Phone:	Email:
<input type="checkbox"/> Yes, please include me in the quarterly E-Biz Newsletter	

STEP 3: COMPLETE PROJECT DETAILS

Application is for:	Owner Lessee/Renter	# of Employees at the Project Address: FT: _____ PT: _____
Facility Information		
Facility Type:	Business Type:	
HVAC Operating Hours:	Building Operating Hours:	
Average Yearly Occupancy (%):	# of Floors:	Interior Floor Area (ft ²): Percent Conditioned (%):
Year Facility Built:	Year of last RCx:	Total annual energy consumption (kWh/yr):
General Description of Building and Existing Equipment:		
Project Information		
Objective of RCx Project:		
Estimated Cost:	Estimated Completion Date of RCx:	



Hawai'i Energy

RECOMMISSIONING/RETROCOMMISSIONING INCENTIVE APPLICATION

EFFECTIVE JULY 1, 2017 THROUGH JUNE 30, 2018 OR WHILE FUNDING LASTS.

STEP 4: AUTHORIZED ACCOUNT HOLDER SIGNATURE

I have read, understood and agree to the Terms and Conditions, as well as the application procedure detailed on this application. I am submitting the Tax Form W-9 to Hawai'i Energy with this application. I further understand that the Hawai'i Energy Program will mail applicants and report to the IRS all applicable incentive payments on the Internal Revenue Service Form 1099. I am further advised to consult my tax advisor concerning the taxability of the incentive. Hawai'i Energy Program is not responsible for any taxes that may be imposed on me or my business as a result of my receipt of this incentive.

By signing this document, you are declaring that **Hawai'i Energy is authorized to direct the Incentive payment to the Payee** as listed above. **I understand Incentives are not guaranteed**, available on a first-come, first-served basis and subject to the availability of funds without notice.

PRINT NAME: _____ **TITLE:** _____

SIGNATURE: _____ **DATE:** _____

HAWAI'I ENERGY USE ONLY:	Received date:	Initials:
	Application #:	Pre-Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No



Hawai'i Energy's Terms and Conditions

1) Incentives:

Subject to these Terms & Conditions, Hawai'i Energy (the Program) will pay incentives for the installation of qualified and verified Energy Efficiency Measures (EEM) that meet eligibility.

2) Eligibility:

- a) "Applicant" is a commercial rate schedule account holder of an electric utility on the island of Hawai'i, Lāna'i, Maui, Moloka'i or O'ahu that contributes into the Public Benefit Fund (PBF) where the electricity-saving EEM has been installed. Incentives are awarded only to an eligible account holder. The Account Holder can reassign the incentive payment to the trade ally or designated third party. Applicants are ultimately responsible for the compliance with these terms and conditions.
- b) "Qualifying EEMs" are those electricity-saving Energy Efficiency Measures (EEMs) that are identified in the Program applications and associated materials for the various Standard/Prescriptive and Custom Incentives. Unless explicitly approved before installation by the Program, all installed equipment must be new, meet Program specification requirements and be fully in operation prior to the incentive being paid.
- c) Incomplete and/or unsigned applications will be returned unprocessed.
- d) For completed projects, a completed application, worksheets, invoices and other support documents must be received within six (6) months of the installation date/invoice date to be considered for incentive.

3) Installation Verification and Data Collection:

- a) The Program may conduct an inspection of the facility to verify pre-installation conditions or confirm installation prior to incentive payment, at any time after receipt of the application and up to five (5) years after the payment of incentive.
- b) The Applicant must provide reasonable access to the facility, the installed equipment, and related documentation and data needed to verify the application.
- c) The Program may install metering devices on EEMs for program data collection, measurement and verification purposes.

4) Compliance:

The Applicant is responsible to abiding by all applicable laws, rules and regulations, and complying with all federal, state, and local codes. Applicant agrees that if the EEM specified in this application is not still in full effect for a period of five (5) years, it will return to Hawai'i Energy the prorated portion of the incentive dollars based on the expected life (as determined by Hawai'i Energy) of the measure for which incentives were provided.

5) Program Availability:

Payment of rebates is not guaranteed and is subject to the availability of funds.

6) Publicity:

Applicant gives Hawai'i Energy and its administrator Leidos, Inc. permission to use Applicant's name, likeness, image, voice, and/or appearance, as such may be embodied in any pictures, photos, video recordings, audiotapes, digital images, and the like, taken or made on behalf of Hawai'i Energy activities. I agree that the Hawai'i Energy program and Leidos, Inc. have complete ownership of such pictures, etc., including the entire copyright, and may use them for any purpose consistent with the Hawai'i Energy program's mission.

Hawai'i Energy's mission is to empower island families and businesses to make smart energy choices that reduce energy consumption, save money and pursue a 100% clean energy future.
PY1720170619-001RF

These uses include, but are not limited to illustrations, bulletins, exhibitions, videotapes, reprints, reproductions, publications, advertisements, and any promotional or educational materials in any medium now known or later developed, including the Internet. Applicant acknowledges that they will not receive any compensation, etc. for the use of such pictures, etc., and hereby release the Hawai'i Energy program and Leidos, Inc. and its agents and assigns from any and all claims which arise out of or are in any way connected with such use.

7) Disclaimers:

- a) The Program is not responsible for any tax liability imposed on the Applicant as a result of the payment of any incentive.
- b) The Program is not responsible for obtaining any missing information, signatures, invoices or going to the installation site or contacting the Applicant to inform Applicant of incomplete or missing documentation.
- c) The Program does not expressly or implicitly warrant the performance of installed equipment, the quality of any contractor's work, or that the EEM will result in any energy or cost savings.
- d) The Program is not responsible for the proper disposal or recycling of any waste generated as a result of this project.
- e) The Program does not endorse any particular market provider, trade ally, manufacturer, product, laborer or system design by offering this Program.
- f) **The Program does not guarantee that funding will be available for payment of incentives** until this application has been verified and approved by Hawai'i Energy. Submission of the application does not warrant payment under any circumstances should the application not be approved or funding is not available.
- g) Applications for Recommissioning/Retrocommissioning require written pre-approval from the Program. Studies are not used to show the competitive advantage of one vendor over another, or to take inventory of an applicant's equipment. See the Energy Studies Worksheet for more details

8) Indemnification and Limits of Liability:

- a) Applicant shall hold harmless the Program and the Program's agents, contractors, employees, officers and directors from any and all liability, claims, loss, damage, death or injury including reasonable attorneys' fees and costs, arising out of or relating to the installation, use and maintenance of the equipment, designs, practices or methods involved in the Applicant's project.
- b) In no event shall either the Program, or any other indemnified party be liable for any punitive, exemplary, special, indirect, incidental or consequential damages (including, but not limited to, lost profits, lost business opportunities, loss of use or equipment down time, and loss of or corruption to data) arising out of or relating to this agreement, regardless of the legal theory under which such damages are sought.

9) Federal Tax ID of Payee/Taxability:

Applicant must submit to Hawai'i Energy all payee information and the IRS Form W-9 at the beginning of every calendar year for processing of the IRS Form 1099. It is understood that Hawai'i Energy will forward a copy of the IRS Form 1099 to the payee at the end of the calendar year.

10) Entire Agreement:

The entire agreement between the Applicant and the Program is composed of an approved, fully-executed application, and, as applicable, attachments to the application and/or worksheet, pre-installation approval letters, invoices, receipts and any and all such other documentation as required by the Program.