

Custom Application

The Retrofit Program is designed for Commercial and Industrial (C&I) customers to help replace aging and inefficient equipment and systems with more energy efficient technologies, tailored to your specific needs. Under this Custom application, we offer incentives to help you target unique energy efficiency opportunities not covered by our prescriptive applications. If a project saves energy, National Grid will work with you to quantify the benefits and potentially help fund a portion of the project. Custom incentives are generally designed to cover up to 50% of the project costs, which include labor and materials.

Custom Application Process

1. All applications for incentives under the Custom program require sound documentation of the proposed cost, projected electricity savings and the related non-electric savings. To be eligible for National Grid's Custom program, a customer must be an Upstate New York Commercial electric account holder and pay into the System Benefits Charge (SBC). IRS-recognized farms and religious organizations may also be eligible if they pay into the SBC. Please verify with a copy of the National Grid electric utility bill.
2. Before applying, check with your National Grid representative to determine eligibility of the proposed project and to establish requirements for detailed savings projections and cost estimates.
3. This information will be submitted to National Grid's Technical Representative for review and evaluation of potential incentives.
4. The Technical Representative will develop a Minimum Requirements Document, which describes the minimum equipment specifications and operational requirements of the proposed system. Customer will be required to sign and comply with requirements outlined in this document.
5. For projects requiring Commissioning (Cx), a preliminary Cx plan and schedule will be required as part of the MRD.
6. After successful review and project approval, the National Grid representative will notify customer in writing of the project approval, the incentive value and the terms and conditions required to receive final incentive payment.

The following is a guide to the level of technical information and documentation that is typically required.

Project Description:

- General description of facility and the facility's use and typical operation (include occupancy schedules).
- Overall project description including operating schedules and parameters.

Existing Materials and Equipment:

- Detailed description of equipment and operations.
- Cut sheets with equipment performance ratings (BHP, CFM, kW, etc.) (Provide nameplate data if cut sheets unavailable)
- Part load performance data where applicable.
- Description of controls & sequence of operations.

Proposed Materials and Equipment:

- Detailed description of equipment and operations.
- Cuts sheets for the materials or performance ratings for equipment being installed (BHP, CFM, PSI, Efficiency rating, U-value, Lumens, etc.)
- Description of controls & sequence of operations.

Load Profile:

- Equipment hours of operation (operating schedule per day, week, year).
- Provide operating load profiles showing how equipment load and operating parameters vary over time due to changes in: occupancy, weather, production, etc. Where there are existing systems involved, metering kW and kWh of major equipment loads is recommended.
- If metered information is not available, provide other documentation used to estimate loads and operating hours.

Saving Calculations:

- Show calculations used to determine electricity savings including:
 - Existing Consumption (kWh)
 - Proposed Consumption (kWh)
 - kWh Savings shall be broken down into the appropriate electric time-of-day rate categories to determine average \$/kWh saved.
 - Existing Summer Demand (kW) (typical 24 hour load profile(s) for July and August)
 - Proposed Equipment Summer Demand (kW) (typical 24 hour profile(s))
 - Document customer's actual billed kW savings if different from equipment kW savings
- The calculations should clearly show all the details of how the energy savings were estimated. This includes all engineering formulas and documentation of all the factors, values and assumptions used in the formulas.
- Spreadsheets (Excel preferred) must be submitted showing all energy and demand savings calculations.
- In cases where energy modeling is used to determine savings, approved modeling software must be used. Input and output data from the model must be provided.

Program Details:

- This Retrofit program covers applications created on or after January 1 of the current year. Details of this program, including incentive levels, are subject to change without prior notice. This application and all required documents must be provided to your NG representative in one complete package. Otherwise the application will be put on hold. Please be sure to include a copy of all paid invoice(s) on company letterhead indicating the type, size, make, model and quantity of all equipment and include burdened project labor costs.

Custom Retrofit Program UNY

Custom Application

ALL FIELDS ON THIS PAGE ARE REQUIRED.

CUSTOMER/ACCOUNT HOLDER INFORMATION (Customer must submit a W-9 Form)

Customer Facility Name	Contact Person	Application Date																															
Phone	Fax	Customer Federal Tax ID Number																															
Install Site	Email Address	Square Feet (Covered by this application)																															
Street Address	City	State	Zip																														
Mailing Address (If different)	City	State	Zip																														
Company Type <input type="checkbox"/> Incorporated <input type="checkbox"/> Exempt <input type="checkbox"/> Not Incorporated	Classification Type <input type="checkbox"/> \geq 2MW (Large) <input type="checkbox"/> $<$ 2MW (Mid-size) <input type="checkbox"/> Industrial <input type="checkbox"/> Commercial * \geq 2MW Large Commercial use the $<$ 2MW Classification																																
Customer of Record: Billing Account Number (Required)	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>																																
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HVAC System Type (For custom lighting apps only – select one)

- | | | |
|------------------------------------------------|------------------------------------------------------------|--------------------------------------------------------------|
| <input type="checkbox"/> AC with Electric Heat | <input type="checkbox"/> Electric Heat Only | <input type="checkbox"/> H2O Cooled Ammonia Screw Compressor |
| <input type="checkbox"/> AC with Gas Heat | <input type="checkbox"/> Fan Coil with Chiller and Hot H2O | <input type="checkbox"/> Steam Heat Only |
| <input type="checkbox"/> CV ECON | <input type="checkbox"/> Gas Heat Only | <input type="checkbox"/> VAV ECON |
| <input type="checkbox"/> CV No ECON | <input type="checkbox"/> Heat Pump | <input type="checkbox"/> Other_____ |

Is this an exterior/non-conditioned space installation? Yes No

INCENTIVE PAYMENT

<input type="checkbox"/> Customer Address Above <input type="checkbox"/> Installation Contractor / Equipment Vendor/ Project Expediter <input type="checkbox"/> Other (Fill out below)			
Business Name	Contact Person		
Street Address	City	State	Zip
Phone	Email Address		
Company Type	Federal Tax ID Number (Required if receiving incentive)		

Custom Application

INSTALLATION CONTRACTOR/PROJECT EXPEDITER INFORMATION			
Installation Company	Project Expediter	Contact Person	
Street Address	City	State	Zip
Phone	Email Address		
Company Type	Federal Tax ID Number <i>(Required if receiving incentive)</i>		

EQUIPMENT VENDOR INFORMATION			
Equipment Vendor Company	Contact Person		
Street Address	City	State	Zip
Phone	Email Address		
Company Type	Federal Tax ID Number <i>(Required if receiving incentive)</i>		

ADDITIONAL APPLICATION INFORMATION	
Expected Completion Date of Project	
Total Cost Of Labor And Materials For Installed Equipment* An actual invoice on company letterhead is required to be submitted to National Grid before final payment of incentive.	\$

CUSTOMER ACCEPTANCE OF TERMS				
<input type="checkbox"/> I certify that all statements made in this application are correct to the best of my knowledge and that I have read and agree to the terms and conditions of National Grid's Retrofit Program.				
By (Authorized Signature)	Printed Name	Title	Company	Date

Custom Application

The following form may be filled out for preliminary project submittal and review, but a final Custom Project information package must also be submitted in electronic format. Contact a National Grid Technical Support Consultant for details.

PROPOSED EQUIPMENT SPECIFICATION (FACILITY DETAIL)

BUILDING, ROOM AND EQUIPMENT IDENTIFICATION (INSTALLATION SITE):

DESCRIPTION OF PROJECT:

EXISTING SYSTEM

MEASURE DESCRIPTION

PROPOSED SYSTEM

MEASURE DESCRIPTION

Manufacturer Incentives, Manufacturer Discounts, Taxes, and /or Salvage Values

Internal Use Only: **MEASURE CODE:**

MEASURE DESCRIPTION:

DOES THIS PROJECT INCLUDE A VARIABLE FREQUENCY DRIVE (VFD)? YES NO *(if yes – see information below)*

VFD's can be sensitive to over-voltages that occur when power factor correcting capacitor banks on utility power systems are switched on. To help increase operating reliability, it is highly recommended, but not mandatory to qualify for an incentive, to have each VFD drive be equipped with a series line reactor (inductor, choke) in its AC input connections. The minimum suggested requirement is a 3% impedance reactor, based on the horsepower of the VFD to be installed. In some instances it may be necessary to install 5% reactors or additional filtering devices on the output side of the drive to meet acceptable current and voltage harmonic distortion requirements. Customer should always verify specific requirements with the manufacturer of the drive for optimum results.

If your power factor is less than 0.8 (80%), National Grid recommends that you consider power factor correction concurrent with the installation of drives.

The use of VFDs which incorporate pulse width modulation (PWM) may produce over-voltages which may cause premature failure of AC induction motors not rated for use with an inverter. We recommend that when installing PWM drives, you consider utilizing inverter-rated motors.

Custom Application

Table 1: Energy and Demand Reduction

Please provide the Demand (kW) Reduction that occurs during the time periods listed below and the Annual kWh savings:

TIME PERIOD	AVERAGE REDUCTION
June - 4 pm - 5 pm	kW
July - 4 pm - 5 pm	kW
August - 4 pm - 5pm	kW
Annual kWh Savings	kWh

- Average Demand reduction is for the summer Peak kW savings that occurs during summer peak load conditions. It is calculated as the demand savings during the hottest weekday non-holiday hour between 4 pm and 5 pm in the months of June through August. For buildings which may only be partially occupied during this peak hour, the kW savings should be reduced in relation to the % reduction during that operating period (i.e.: if the lights are only on 50% of the time during that hot summer day, kW savings would be reduced by ~50%). Some measures may provide little or no peak demand savings, i.e. if a manufacturer turns off lighting at 3 pm on all days during the summer then the peak demand savings for a lighting measure during the peak period is zero.
- The kW savings is the average load reduction during the high cooling period.

Table 2: Cost Estimates

Please provide backup documentation for all material and labor costs, broken down by major pieces of equipment and project components. Sales tax may not be included. Adjust for salvage/resale value of equipment being replaced. Enter summarized costs in the table below.

MEASURE	COST (\$\$\$)
Estimated Material Cost	
Estimated Labor Cost	
Estimated Total Cost	

Table 3: Non-Electric Benefits and Effects

Installing the proposed measure may result in significant savings or possibly increased costs for the owner beyond electric savings. Examples include water, sewer, fossil fuel and labor costs. These costs are to be assessed and quantified in the support documentation. These effects are to be combined and reported in the categories laid out in Table 3.

NON-ELECTRIC BENEFITS	
Gas - Space Heating	_____ Therms
Gas - Non Heating	_____ Therms
Oil	_____ Gallons
Water	_____ Gallons
Wastewater (Sewer)	_____ Gallons
O & M (\$/yr) (Labor & Materials)	\$ _____
Site Environmental	\$ _____
Other _____	\$ _____