



Ohio Edison • The Illuminating Company • Toledo Edison

Your First Source for
Energy Savings

Custom Incentives Program

The Custom Incentives Program from Ohio Edison, The Illuminating Company and Toledo Edison (FirstEnergy's utilities) offers incentives and information to encourage participants to install high-efficiency equipment. The program is funded by nonresidential customers of FirstEnergy's utilities in Ohio in accordance with Senate Bill 221.

Effective Dates

To qualify for incentive levels on this application form, the financial commitment to purchase equipment related to the project must have been purchased on or after July 1, 2011.

Eligible Participants

The Custom Incentives Program is available to commercial and industrial retail service customers of FirstEnergy's utilities in Ohio.

Eligible Projects

Custom projects include technologies and/or customer specific [energy efficiency projects](#) that do not meet the eligibility criteria for other FirstEnergy utility business programs. To qualify for custom incentives, project must have a simple payback between 1 and 7 years before applying incentive.

Possible custom projects include:

- Upgrade of an existing industrial process
- New construction or renovation projects that involve multiple building systems (i.e. lighting, HVAC, and building envelope)
- Replacement of existing motors larger than 200hp
- Replacement of an existing motor speed control with a new VSD
- Installation of a VSD controlling more than 500 hp
- Replacement of motors greater than 200 hp
- Water/wastewater system improvements
- Building control systems such as Demand Control Ventilation or Exhaust Air Heat Recovery, and Economizers
- Compressed air system upgrades
- New and emerging technologies

Examples of projects/technologies that do NOT qualify for Custom Incentives:

- Power factor correction devices
- Motor soft starts
- Renewable energy technologies that generate electricity (i.e. solar photovoltaic, wind generation, micro-hydropower, etc)
- Any electric generation projects
- Fuel switching (i.e. replacement of an electric chiller with an absorption chiller)

Limitations

Incentives available from the Custom Incentives program are limited to the total project cost.

Pre-Approval Requirements

All custom project applications must include all technical information and documentation as detailed on page three of this form. All custom projects will require program approval prior to the purchase and installation of equipment (pre-approval), regardless of the total incentive requested.

Measurement and Verification Requirements

Projects involving systems designed for a single facility, such as process improvements or large compressed air systems are likely to require both pre-installation and post-installation data collection to support energy savings calculations.

Questions?

If you have questions, please review the FAQ section of the program website at www.energysaveOhio.com This information is being updated regularly.

Specific questions also can be sent to program representatives via email at energysaveOhio@saic.com

How Do I Apply for Incentives?

Please review the Business Program Terms & Conditions and application requirements.

- Step 1:** Review program materials to confirm the energy efficiency measures meet program requirements. Visit www.energysaveOhio.com or contact us at energysaveOhio@saic.com or 1-866-578-5220 with questions.
- Step 2:** Complete the program application and attach supporting technical documentation required to verify equipment energy use, such as manufacturers' cut sheets. Please sign the application form and submit a complete application package to the program manager for consideration, review and approval. Incomplete applications will not be considered and will be returned to the applicant for completion.

A complete application package includes:

- A signed application form, with summary information fields entered on page 3 of this form,
- A detailed energy savings analysis as described on page 3 of this form,
- A copy of IRS form W-9, and
- Manufacturers' specification (cut) sheets for each equipment item to verify that the equipment is rated at the efficiency levels used in the calculations.

Complete application packages must be returned via email, fax or hardcopy:

Mail: **Custom Incentives for Business Program**
8870 Darrow Road
Suite F106-243
Twinsburg, OH 44087
Fax: 440-201-6936
Email: energysaveOhio@saic.com

- Step 3:** The program manager will notify the applicant via email when the review is complete and funds have been reserved. Upon receipt of program pre-approval, participants may purchase and install their energy efficient equipment.
- Step 4:** Once the project is complete, you should review your approved application for any changes to the project that occurred during installation and make the needed corrections. Resubmit the updated application, along with a dated proof of purchase, to the program for payment.

Applications and supporting technical documentation will be reviewed by program staff, and an onsite inspection to verify the installation may be conducted. Upon receipt and verification of all required documentation, the incentive check will be processed and mailed to the applicant or to an authorized representative, if requested on the application.

To confirm tax status, all applicants (including tax exempt entities) must submit a W-9 with Tax Identification associated with the incentive recipient to enable processing. Incentives will not be paid until W-9s have been received.



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CUSTOMER AND PROJECT INFORMATION					
Customer Information					
Company Name:			Utility Company: Ohio Edison The Illuminating Company Toledo Edison		
Tax ID (SSN/FEIN):			Account Number (Required)		
Mailing Address (check mailed to):		City:		State:	Zip:
Contact Name:		Title:			
Email Address:		Telephone:		Fax:	
Physical Installation Address (if different from above):		City:		State:	Zip:
How did you hear about the program? Program Contact Utility Contact Program Ally Direct Mail Mass Media Seminar FE Account Manger _____ Program Administrator _____ Other _____					
Contractor / Program Ally Information – if applicable					
Company Name:		Contact Name:		Title:	
Mailing Address:		City:		State:	Zip:
Email Address:		Telephone:		Fax:	
Authorization for Incentive Payment to Third Party Please note that payment will be made to Contact at Company listed above unless Third Party payment is authorized. If check is to be paid to a Third Party, please fill this Authorization box completely.					
Payable To:			Representative Contact:		
Mailing Address:		City:		State:	Zip:
Phone:		Email Address:		Tax ID (SSN/FEIN):	
Customer Contact Signature: _____					
Print Name: _____ Date: _____					
Facility / Project Information					
Facility Type (check one): Education – Primary School Education – Secondary School Education – Community College Education – University Grocery Medical – Hospital Medical – Clinic Lodging Hotel (Guest Rooms) Lodging Motel Manufacturing – Light Industrial Multifamily – Common Areas Office – Large Office – Small Restaurant – Sit-Down Restaurant – Fast-Food Retail – 3-Story Large Retail – Single-Story Large Retail – Small Storage – Conditioned Storage – Unconditioned Warehouse Other: _____		Please choose the best description of the predominant space type included for this project (check one): Air Conditioned Space No Air Conditioning Freezer Space Refrigerated Space _____ New Construction Existing Facility		Customer Class (Check all that apply): Not-for-Profit Multifamily Commercial Industrial Government (State, County or Municipal) Institutional Low Income Federal Government Note: Residential customers may take advantage of a different program.	
		Is natural gas available at your facility? Yes No		Facility Size (approx. sq.ft.): _____	
		Start Date (MM/DD/YYYY) _____ Completion (MM/DD/YYYY) _____			
		Estimated Equipment Cost: _____ Estimated Total Project Cost: _____			

PROJECT ESTIMATED ANNUAL SAVINGS SUMMARY	
Estimated Annual kWh Savings	
Summer Peak Demand Reduction (kW)	
Annual Estimated Cost Savings	
Annual Operating Hours	
Total Incentive @ \$0.08/kWh savings	
Cost of Materials <i>For pre-approval, this will be an estimated cost.</i>	
Cost of Labor <i>For pre-approval, this will be an estimated cost.</i>	
Payback Period BEFORE Incentive	
Payback Period AFTER Incentive	
Incentive as % of Total Project Cost <i>(for informational purposes)</i>	

Please attach a detailed energy savings analysis or technical study that clearly states

- the project scope,
- pre- and post-installation equipment and operation,
- all energy calculations associated with the project, including relevant engineering assumptions and
- any manufacturers' specification (cut) sheets to verify the size, operation, and efficiency levels of proposed equipment, as needed.

You may also attach additional spreadsheets or output reports from other analysis tools used to evaluate the project.

Within the documentation, please clearly indicate the location of the following key information:

- Executive summary,
- Calculations of annual baseline energy use (pre-installation),
- Calculations of annual proposed energy use (post-installation),
- Estimated Annual Energy savings in kWh/year,
- Estimated Peak demand reductions in kW, and
- Equipment manufacturer specification (cut) sheets for proposed equipment.

Brief description of the existing equipment:	
Brief description of new, efficient equipment:	

BUSINESS PROGRAM TERMS & CONDITIONS

<p>Definitions</p>	<p>FIRSTENERGY COMPANIES (“THE COMPANY” OR “COMPANIES”) – Toledo Edison, The Illuminating Company, and Ohio Edison.</p> <p>PROGRAM or Programs – Companies’ programs approved by the Public Utilities Commission of Ohio (“PUCO”) for implementation under Ohio Senate Bill 221. This application relates to the Business programs supporting energy efficiency in the Companies’ Commercial and Industrial customer facilities including, municipal, government and institutional facilities.</p> <p>PROGRAM MANAGER – The party contracted by the Companies for management of the Programs.</p> <p>ENERGY-EFFICIENCY MEASURES – Any equipment or action eligible to receive a Program Incentive payment under the Program.</p> <p>PARTICIPANT (or PARTICIPATING CUSTOMERS) – Those non-residential electric retail service eligible customers of the Companies who participate in this Program.</p> <p>PROGRAM INCENTIVES – Refers to the monetary incentive, rebate or service that the Program provides to participating customers pursuant to the Program.</p>
<p>Eligibility</p>	<p>“Participant” or “Participants” are Program customers identified above served by Toledo Edison, The Illuminating Company, and Ohio Edison as defined above. Residential customers are not eligible for incentives through the Commercial and Industrial Programs. Incentives are awarded only to Participants, or their assigned agents, for qualifying equipment (“Energy Efficiency Measures”) that is installed in the State of Ohio at the location identified in this Application, and such Participants are responsible for compliance with the Terms and Conditions set forth herein.</p>
<p>Compliance</p>	<p>The Participant is responsible to comply with all applicable laws, rules and regulations, and to comply with all federal, state, and local codes.</p>
<p>Publicity</p>	<p>With Participant’s written permission, the Companies may publicly recognize participation in the Programs and disclose information relating to the Participant’s participation in the program, including such data as: projected project energy savings, the incentive amount, and other similar information.</p>
<p>Application and Eligibility Process</p>	<p>The Programs provide for payment of incentives after the installation of qualified energy efficiency measures and review of final documentation for compliance with program requirements by the Program Manager. In order to be eligible for incentives, a Participant, or an agent (contractor/vendor) authorized by the Participant, must submit a properly completed pre-installation application package, including an application and technology worksheets, to the Program Manager before the equipment is purchased. If eligible, the Participant will receive an approval letter with the estimated incentive amount and the date by which the equipment must be purchased and installed for the approval to remain in effect.</p> <p>After installation is completed, the Participant must finalize and resubmit the completed equipment application reflecting the “as built” project, along with the invoice, the manufacturer’s equipment performance sheet, and any other required documentation as may be specified on the application or in the program’s initial approval letter. Applications must be filled out completely, truthfully and accurately, and include signatures of the Participant and its authorized agents (as appropriate). Final payment will be based on the “as-built” documentation provided with the final project application.</p>
<p>Dates of Program</p>	<p>Incentives are available for eligible Energy Efficiency Measures for which equipment is purchased and installed on or after April 11, 2011. Dated Proof of Purchase and complete documentation will be required with final applications for the participant to be eligible for incentive payment. The program is subject to revision or termination at any time by the Companies.</p>
<p>Installation Schedule Requirements</p>	<p>Pre-approved projects will receive approval letters defining terms for payment and a commitment expiration date. If the Participant: (1) has not engaged in installation of the pre-approved project; and (2) has not applied to the Program Manager for a project extension within 90 days for all from the date the Program Manager pre-approves the project, the Program Manager may cancel Participant’s application without liability.</p>
<p>Acceptable Proof of Purchase</p>	<p>Acceptable forms of Proof of Purchase include paid invoices or receipts. The documentation must show item numbers, quantities and descriptions that are of sufficient detail to verify that the installed equipment meets efficiency requirements. Additionally, the post-installation documentation must include manufacturers’ specifications (“cut sheets”) that list the efficiency ratings of the equipment. <i>The Program Manager may, at its sole discretion, accept other forms of proof of purchase.</i></p>
<p>Evaluation, Measurement and Verification</p>	<p>The Program Manager may, but is not obligated to, conduct an inspection of the facility to verify pre- and post-installation conditions or verify documentation prior to incentive payment, at any time after receipt of applications and up to 5 years after payment of incentives. In addition, the Ohio Public Utility Commission and the Companies will engage Evaluation Measurement and Verification (“EM&V”) contractors to evaluate program performance which may involve additional visits. The applicant must provide reasonable access to the facility, the equipment, and related documentation and data. The Companies or their agents may install simple/standard metering devices on equipment for program data collection, measurement and verification purposes. The Companies and their agents are not obligated to pay any incentive awards until it has performed a satisfactory post-installation verification, unless it has waived this requirement. If the Program Manager determines that the equipment was not installed in a manner consistent with the approved application, or if non-qualifying equipment was installed, it may require changes before making payment.</p> <p>If qualifying equipment cannot be located at the Participant’s facility or is not installed in a manner consistent with the provisions of these Terms and Conditions, the Companies may seek recovery of the incentives paid.</p>
<p>Assignment</p>	<p>The Participant may assign Program Incentives to a specified third party.</p>
<p>Participating Customer’s Certification</p>	<p>Participant certifies that he/she purchased and installed the equipment listed in its application at its defined Ohio location listed therein. Participant agrees that all information is true and that he/she has conformed to all of the program’s eligibility requirements, terms and conditions.</p>

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Incentive Amounts	Program Incentives will equal either: a) the approved Program Incentive amount reflecting incentives in effect at the time of approval, or b) the actual project cost of the Energy-Efficiency Measure, whichever is less, as determined by the Program Manager. Please allow ninety (90) business days for delivery of the Program Incentive. Applications requiring post-installation inspections and unanticipated high volume of activities may require additional time. If information is missing or incorrect on the application, processing and delivery of the Program Incentive may also require additional time.
Taxes	Incentives received by the Participant under this Application may be taxable by the federal, state, and local government. The Participant is responsible for declaring and paying all such taxes. Companies shall have no liability or obligation for any taxes.
Indemnification and Limits of Liability	<p>The Participant shall protect, indemnify, and hold harmless the Companies' and their parents, subsidiaries, affiliates, agents, contractors, employees, officers and directors from and against all liabilities, losses, claims of death or injury or other damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, attorney's fees and expenses) incurred by or assessed against the Companies or their and their parents, subsidiaries, affiliates agents, contractors, employees, officers and directors arising out of or relating to the performance of this Application or arising out of or relating to the installation, use and maintenance of the equipment, designs, practices or methods involved in this Participant's project.</p> <p>In no event shall any 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 or Program, regardless of the legal theory under which such damages are sought.</p>
Warranties	<p>The Companies and their parents, subsidiaries, affiliates, agents, contractors, employees, officers and directors make no express or implied warranties regarding the performance of installed equipment, the quality of any contractor's work, or that the equipment will result in any energy or cost savings.</p> <p>THE COMPANIES AND THEIR AND THEIR PARENTS, SUBSIDIARIES, AFFILIATES, AGENTS, CONTRACTORS, EMPLOYEES, OFFICERS AND DIRECTORS DO NOT ENDORSE, GUARANTEE, OR WARRANT ANY PARTICULAR MANUFACTURER OR PRODUCT, AND THEY PROVIDE NO WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY OR IMPLIED WARRANTY OF FITNESS FOR ANY PRODUCT OR SERVICES. THE COMPANIES ARE NOT LIABLE OR RESPONSIBLE FOR ANY ACT OR OMISSION OF ANY CONTRACTOR (IF ANY). THE CUSTOMER'S WARRANTIES ARE LIMITED TO ANY WARRANTIES THAT MAY BE PROVIDED BY CONTRACTORS, VENDORS OR EQUIPMENT MANUFACTURER. NEITHER THE COMPANIES NOR THEIR CONSULTANTS ARE RESPONSIBLE FOR ASSURING THAT THE DESIGN, ENGINEERING AND CONSTRUCTION OF THE FACILITY OR INSTALLATION OF THE EQUIPMENT IS PROPER OR COMPLIES WITH ANY PARTICULAR LAWS, CODES, OR INDUSTRY STANDARDS. THE COMPANIES DO NOT MAKE ANY REPRESENTATIONS OF ANY KIND REGARDING THE RESULTS TO BE ACHIEVED BY THE ENERGY EFFICIENCY MEASURES OR THE ADEQUACY OR SAFETY OF SUCH MEASURES.</p>
Recycling (Proper Disposal of Waste)	The Companies and their parents, subsidiaries, affiliates, agents, contractors, employees, officers and directors are not responsible for the proper disposal or recycling of any waste generated as a result of this project.
Endorsement (Product/Vendor Neutrality)	The Companies and their parents, subsidiaries, affiliates, agents, contractors, employees, officers and directors do not endorse any particular market provider, manufacturer, product, labor or system design by offering this Program.
Termination	<p>Incentives are available for energy efficiency measures on a first-come, first-served basis subject to the availability of funds. Program availability, program terms and equipment eligibility may change without notice at the discretion of the Companies.</p> <p>Submission of any application does not give rise to any obligation to make any incentive payment by the Companies and their parents, subsidiaries, affiliates, agents, contractors, employees, officers and directors.</p>

ACKNOWLEDGEMENT

For faster application processing, please be sure to include the following items with your application form:

- Complete Application (Customer and Project Information page, Equipment page, and signed Acknowledgement page)
- Utility Account Number (on Customer and Project Information page)
- Manufacturer specifications/technical cut sheets for all proposed equipment. PLEASE BE SURE TO CIRCLE OR HIGHLIGHT THE RELEVANT INFORMATION (i.e. – equipment efficiency rating)
- W-9 form with Tax Identification associated with the incentive recipient (please submit with final application to facilitate faster incentive payment)

I read, understand and am in compliance with all rules and regulations concerning this Program. I certify that all information provided is correct to the best of my knowledge, and I give the Companies permission to share my records with the Public Utilities Commission of Ohio, or its contractors, who plan to evaluate my energy usage. Additionally, I will allow reasonable access to my property to verify the installation and performance of the Energy Efficiency Measures that are eligible for incentives under the Programs. I also understand that all materials removed must be permanently taken out of service and disposed of in accordance with all applicable local codes and ordinances.

Signature: _____ Date (MM/DD/YYYY): _____

Print Name: _____ Title: _____

By signing, I certify that I have read, understood and agree to the terms and conditions listed above and are authorized to sign on behalf of the participant.

INSTRUCTIONS: After clicking Submit above, if a new email message appears with this completed form attached, attach your supporting documentation (cut sheets, W-9 form, signature page, etc) to the email and click send. You can then save a copy of the completed form to your hard drive if you wish.

If a new email message does not appear, you'll need to save this completed form to your desktop. Then, create a new email message addressed to energysaveOhio@saic.com, attach the file you just saved as well as your supporting documentation (cut sheets, W-9 form, signature page, etc) to the email and click send.

Individual attachments may not exceed 6MB in size. The sum of all attachments may not exceed 10MB. PDF documents can generally be reduced sufficiently by selecting "Reduce File Size" under the "Document" menu in Adobe Acrobat.

Thank you for submitting your forms electronically. This allows us to provide you with a faster response with our electronic forms. Applications submitted with our electronic forms can expect a much faster response from the program.