



PROGRAM DESCRIPTION & IMPLEMENTATION

PROGRAM OBJECTIVE

- This submetering incentive is designed to encourage master-metered condominiums and their Association of Apartment Owners (AOAO) to install billing submeters for their residential units and common areas. The goal is to reduce electricity consumption and promote equity in allocation of electricity costs by resident. The knowledge of personal electricity usage and the responsibility to pay for it motivate behavioral modification and reward those who invest in energy-efficient equipment within their units.
- The combination of billing submeters, along with education, peer group comparisons and special equipment offerings, will assist unit residents to achieve significant energy conservation and efficiency.
- In addition, the AOAO has an opportunity to receive an energy audit of the property and participate in other Hawai'i Energy incentives to reduce electricity usage in common areas. Possible incentives include improved HVAC efficiencies, lighting, pool pumps, domestic water pumps and parking garage exhaust fans.

INCENTIVE

- The incentive is \$150 per unit submetered, not to exceed 50% of total project cost. The incentive does not apply and is not valid towards a replacement submetering system.
- The incentive will be made payable to the AOAO towards the purchase and installation of a third-party submetering system. The submetering system is to be used for billing purposes so that each resident of the unit metered will be responsible for the payment of his or her own electric consumption.
- Incentive payment will be made upon completion of installation of submeters and a billing system, a residential electricity conservation and efficiency workshop, energy audit of the AOAO property and commencement of real-time billing to individual units.

ENERGY SAVINGS

- Post-submetering electricity reduction can range from 3% up to 25%, depending on the property and behavioral changes of the residents. However, no minimum reduction in electricity usage is required to receive or retain the incentive.

REQUIREMENTS

- See Attachment 1 (Requirements for Submetering Incentive and Recommended Best Practices for Submetering).

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.

DOCUMENT SUBMITTALS

- Application
- Incentive Worksheet
- Product Specifications
- Itemized Invoices
- W-9 Tax Form (current year)

QUESTIONS

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

APPLICANT DUE DILIGENCE

Hawai'i Energy strongly recommends that Applicant conduct a thorough due diligence for all aspects of the submetering. Please review the Requirements for Submetering Incentive and Recommended Best Practices for Submetering documents below.



REQUIREMENTS FOR SUBMETERING INCENTIVE

1. PRE-APPROVAL:

Hawai'i Energy (or the Program) pre-approval is required **prior** to the start of the submetering project. No exceptions will be allowed. Once an application/worksheet is submitted, the project will be reviewed. Pre-approval will be sent via email to the address provided in the application/worksheet. Installation must commence within six months of Program pre-approval.

2. METERING ACCURACY CERTIFICATION:

The manufacturer's submetering system model type to be installed (meter and CTs) must have been tested by an independent third party that is Nationally Rated Testing Laboratory certified for ANSI C12.2. The certification documentation must be provided to the Program prior to installation. Additionally, manufacturers must have a factory-quality compliance procedure in place to ensure meter accuracy. Documentation of this procedure must be available to the Program upon request.

3. ELECTRICAL SAFETY CERTIFICATION:

The submeter must be UL, CSA or ETL listed (Electrical Safety).

4. INSTALLATION QUALITY CONTROL:

The submetering system must be equipped with diagnostics to ensure proper wiring and CT installation. An electrical system wiring one-line diagram showing installation locations (with meter numbers corresponding to tenant unit) and wiring diagrams specific to the site must be provided to the AOA for future use in maintenance and trouble-shooting.

5. COUNTY PERMIT NUMBER:

The submetering system must be installed according to all applicable city and county, state and/or federal codes, laws, rules and regulations. The Program's receipt of the applicable county permit number (e.g., building or electrical as determined by the county) is a prerequisite to the Program making the incentive payment.

6. UNIT ACCESS TO METERING DATA:

The submetering system must provide condominium units with access to usage data for their units. This includes display forms such as in-unit meter registers, lobby registers, kiosks (on-line/networked to data collection server) and/or independent on-line access.

7. USAGE DATA REPORTS:

Monthly submetering data by unit must be provided by the applicant in an .xls or .csv spreadsheet to Hawai'i Energy for analysis purposes during the first two (2) months of "mock" billing and then for the next six (6) months. Monthly data is due to Hawai'i Energy within thirty (30) days of the billing cycle end.

8. MEASURE PERSISTENCE:

The submetering system must remain in place and used for billing purposes for at least five (5) years after installation. Otherwise, a pro-rated portion of the incentive must be returned to Hawai'i Energy.



RECOMMENDED BEST PRACTICES FOR SUBMETERING

To ensure a successful submetering project, Hawai'i Energy highly recommends a thorough due diligence process to minimize risk and hassle for both equipment and installation. Consider the recommended best practices below:

1. PREPARE RFP:

Develop a scope of services you would like performed and incorporate into a Request for Proposal.

2. CHOOSE A VENDOR:

- Get at least three bids for the project. Hawai'i Energy can provide a list of submetering vendors to the AOA board. Please note that Hawai'i Energy does **not** and **cannot** endorse any submetering vendors. Any lists or information provided are only for your convenience.
- Ask vendors to provide references and specific installation examples, preferably locally. Then call and/or visit these properties. In addition, ask vendors to specify and clarify the warranties offered for the equipment and installation. Issues of vendor stability and support, and its track record of equipment and installation are also important.
- Conduct a final comprehensive review of each vendor and proposal to be sure you are getting an "apples-to-apples" comparison for key provisions, including but not limited to installation, equipment and warranty.

3. DATA COLLECTION/BILLING:

Determine how data collection and billing services are best handled for your property. Will the property management company handle data collection and billing or will the AOA contract with the vendor for these services? Work with your property management firm to see if they can offer their experience with and service for contracting, as well as downstream administration of data collection, billing system and maintenance needs.

4. METER DATA ACCESS:

Each meter should contain a kilowatt hour (kWh) read-out display on the meter or have one connected to it. Options include a "lobby display" feature, kiosks (on-line/networked to data collection server) or independent on-line access. Determine the best features and benefits for your property when making this investment.

5. INSTALLATION CONSIDERATIONS:

Before installation begins, work with your vendor to understand if and when electricity may have to be turned off in units during installation. Notify residents and/or work with them to make sure any critical or special needs requiring electricity are taken care of or arrangements are made, including but not limited to, refrigeration, medical devices and aquariums.



Hawai'i Energy

SUBMETERING INCENTIVE APPLICATION

EFFECTIVE JULY 1, 2018 THROUGH JUNE 30, 2019 OR WHILE FUNDING LASTS.

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

Account Name on Utility Statement:	Property/Building Name:	Account Number:	<input type="checkbox"/> HECO
Account Holder Contact:	Title:	-----	<input type="checkbox"/> MECO
Phone:	Email:		
Installation Address:	City:	State	Zip:
Mailing Address (if different from above):	City:	State:	Zip:
Federal Tax ID of Payee: <small>(Complete Third Party Payment Section if payment is not to Utility Account Holder)</small>			
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 <small>(*If you checked this box, please complete the information below.)</small>			

STEP 2: AUTHORIZATION FOR THIRD PARTY PAYMENT. Please note that payment will be made to the Contact at Company listed above unless Third Party payment is authorized. If check is paid to a Third Party, please fill out this Authorization Box completely.

Payable To:	Representative Contact:
Mailing Address:	
Phone:	Email:

STEP 3: COMPLETE PROJECT DETAILS.

No. of Units at the Install Address:	Facility Size (approx. sq. ft.):	Year Built:		
Estimated Rebate Amount (from the worksheet, subject to validation, qualification and verification): \$				
Estimated Project Costs			Anticipated Project Dates	
Equipment:	Labor:	Total:	Start:	Completion/Install Date:
Clean Energy Ally Information				
Company:			Contact:	
Mailing Address:			Phone:	
			Email:	

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: _____

I am submitting the following documents along with this Commercial Incentive Application (Check all that apply.):

Incentive Worksheet Product Specifications Invoices W-9 Tax Form

HAWAII ENERGY USE ONLY:	App #:	kW:	kWh:	\$/kWh:
	Approval Amount: \$	1 st :	2 nd :	3 rd :



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. These uses include, but are not limited to illustrations, bulletins, exhibitions, videotapes, reprints, reproductions, publications, advertisements, and any promotional or educational materials

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.

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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 certain Qualifying EEMs require written pre-approval from the Program. See application/worksheets for details.

8) Indemnification and Limits of Liability:

- a) Applicant will indemnify, defend, and hold harmless the Program and its administrator Leidos, Inc. and the Program's and State of Hawai'i'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 field or site inspection, 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 the IRS Form W-9 with their application for processing of the IRS Form 1099 (most current version from IRS website and dated in the current year). It is understood that Hawai'i Energy may forward a copy of the IRS Form 1099 to the applicant at the end of the calendar year, should IRS Form 1099 apply.

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.