

# Energy Efficiency Business Incentives Program Checklist

## 1 STARTING POINT FOR ALL SUBMITTALS

- ▶ **Submit Completed Application** (Forms 1, 2, 3)
- ▶ **Submit Completed IRS Form W-9** (if you have not already submitted this form for our records)
- ▶ **Submit Manufacturer Specification Sheets** (Please submit data sheets, not product brochures)
- ▶ **Submit Trade Professional Agreement**
- ▶ **Submit Detailed Project Description** (As a separate attachment)

### DEFINE THE MEASURE COST FOR NEW EQUIPMENT

- Include quantity, materials, labor, and other relevant information
- All measures must have full measure costs
- All measures, except retrofit add-ons, must have incremental measure costs
- Eligible costs include audits, design, engineering, materials, tax, shipping, and labor

### DEFINE THE AGE OF EXISTING EQUIPMENT BEING REPLACED OR CONTROLLED

### DEFINE THE ANNUAL ENERGY USAGE FOR NEW EQUIPMENT\*

- Define the efficiency, run hours, load factor, horsepower, tons, or any other relevant equipment information

- Describe how proposed equipment is controlled (include set points, schedules, and any other relevant information)
- Calculate the total kW, kWh and/or therms that each piece of equipment will consume annually
- Provide calculation tools from the approved list (all spreadsheet tabs must be unlocked and unprotected)

### DEFINE ANNUAL ENERGY USAGE FOR THE EXISTING EQUIPMENT\*

- Define the efficiency, run hours, load factor, horsepower, tons, or any other relevant equipment information
- Describe how existing equipment is controlled (include set points, schedules, and any other relevant information)
- Calculate total kW, kWh and/or therms that each piece of equipment consumes annually
- Provide calculation tools from the approved list (all spreadsheet tabs must be unlocked and unprotected)

### SUBMIT PROPOSED MEASUREMENT AND VERIFICATION (M&V) IF APPLICABLE

\* If lighting is included the **2013 Calculated Lighting Equipment Survey Table** is required



## 2 REPLACE ON BURN OUT AND NEW LOAD PROJECTS

Projects Must Fulfill Items Listed Below and Section 1

### DEFINE THE ANNUAL ENERGY USAGE USING MINIMUM CODE OR INDUSTRY STANDARD PRACTICE (ISP)

- Provide Title 24 minimum code efficiencies or the industry standard efficiencies for the equipment in question
- Define the efficiency, run hours, load factor, horsepower, tons, or any other relevant equipment information

- Calculate total kW, kWh and/or therms consumed annually by minimum code efficiency or industry standard practice equipment
- Describe how code or industry standard practice requires the system(s) to be controlled
- Provide calculation tools from the approved list (all spreadsheet tabs must be unlocked and unprotected)



## 3 EARLY RETIREMENT PROJECTS

Projects Must Fulfill Items Listed Below and Section 1 & 2

### PROVIDE THE FOLLOWING TO SUPPORT AN EARLY RETIREMENT CLAIM

- Simple payback with and without incentives
- Documented equipment alternatives considered by customer

- Statement from the customer supporting remaining useful life – include maintenance records
- Existing equipment invoices (if available)
- Document any non- energy-efficiency drivers of the project

For more detail on early retirement documentation, visit [sdge.com/BusinessIncentives](http://sdge.com/BusinessIncentives).