

## ENERGY SOLUTIONS FOR BUSINESS: Strategic Energy Management and Building Operator Certification Application

### Measure Descriptions

#### Strategic Energy Management

Strategic Energy Management (SEM) Program provides a holistic and systematic approach to continuous energy improvement for commercial and industrial customers with facilities of 50,000 conditioned square feet or larger. There are two paths for SEM:

- Path A - An American Society of Heating, Refrigeration and Air-Conditioning Engineers (ASHRAE) level 2 assessment with low / no cost or prescriptive / custom energy efficiency measure (EEM) installation. Incentive payments 1 through 3 are available for this path. A professional engineering firm works with the customer to submit the application for pre-approval then performs an ASHRAE Level 2 assessment.
- Path B – Low / no cost EEM installation. Incentive payment 2 is available for this path. The customer or contractor submits the application for pre-approval.

Low / no cost EEMs considered within the program are listed on the ENERGY STAR website:

[https://www.energystar.gov/buildings/save\\_energy\\_commercial\\_buildings/ways\\_save/checklists](https://www.energystar.gov/buildings/save_energy_commercial_buildings/ways_save/checklists)

	Incentive	Incentive cap	Criteria
Payment 1	\$20,000	50% assessment cost	approved assessment
Payment 2	\$0.50 / 1 <sup>st</sup> year therm savings	50% installed cost	approved installed low / no cost EEMs
Payment 3	\$20,000	50% assessment cost	approved installed low / no cost EEMs or prescriptive / custom project

#### Building Operator Certification Training

Building Operator Certification (BOC) is a training and certification program for commercial and industrial building operators with facilities of 50,000 conditioned square feet or larger. The curriculum teaches participants how to improve building comfort and efficiency by optimizing the building's systems resulting in energy savings through operation and maintenance and capital measures. Only one application may be submitted to either the customer's natural gas utility or electric utility (not both). Training for building operators located within the ETG service territory is provided by the Clean Energy Center at Penn College. To review the course schedule, visit:

<https://www.pct.edu/business/clean-energy/training-schedule>.

To qualify for Building Operator Certification (BOC) incentives, training must be completed on or before June 15, 2024 and after receipt of a formal pre-approval letter from the program.

Incentive	Incentive Cap	Criteria
\$1,000*	Maximum 2 attendees per site	Certificate of Completion

\* Elizabethtown Gas reserves the right to recover their incentive payment from customer if customer does not attend or complete course after registration.

## Application Instructions

Ensure the facility is eligible to participate:

- a. Review recent natural gas and electric utility bills to confirm service is supplied under an Elizabethtown Gas non-residential rate code, and electric service is under a commercial rate code.
- b. Facility must be 50,000 square feet or larger, documentation may be requested.

**Pre-Approval is required prior to initiating SEM or BOC Training.**

SEM assessment process:

- a. Review SEM Assessment pre-approval checklist.
- b. Collect application supporting documentation as listed.
- c. Complete and sign the application and submit along with supporting documentation in checklist to [ETGBusiness@appliedenergygroup.com](mailto:ETGBusiness@appliedenergygroup.com) for pre-approval.
- d. If questions arise, we will communicate with the designated contact(s) via email to obtain any additional information required.
- e. ASHRAE Level 2 Assessment is performed.
- f. Upon assessment completion, review SEM final approval checklist.
- g. Submit assessment for review and approval.
- h. If SEM Path A was chosen, upon assessment approval, incentive payment 1 will be issued.
- i. Install approved low / no cost measures.
- j. Submit documentation of approved low / no cost measure installation (costs / savings).
- k. Prescriptive / custom measures identified in the assessment can be applied for under the Energy Solutions for Business Prescriptive / Custom Program.
- l. Incentive payment 2 will be issued based upon low / no cost measure installation documentation.
- m. If SEM Path A was chosen, incentive payment 3 will be issued once payment 2 has been made.

BOC training process:

- a. Review BOC Training pre-approval checklist.
- b. Attendee must have two years of building maintenance experience.
- c. Fill in Attendee Information included in BOC checklist.
- d. Complete and sign the application and submit along with supporting documentation in checklist to [ETGBusiness@appliedenergygroup.com](mailto:ETGBusiness@appliedenergygroup.com).
- e. Upon pre-approval, an email will be generated.
- f. Sign up for BOC training through the Clean Energy Center at Penn State (non-incentivized portion of course payment will be required).
- g. To successfully complete the BOC Level I or II course, each participant must attend all BOC classes (in-person and/or virtual), complete all five in-facility assignments, and submit the Training Certificate of Completion Application to AEG. Only two in-person or virtual class sessions may be missed and must be made up at a later date prior to the course completion. If more than two sessions are missed, the participant will forfeit their participation in the course and may be required to pay the course incentive fee back to Elizabethtown Gas.
- h. Review BOC training final approval checklist.
- i. Collect and submit supporting documentation as listed.

# Program Application

## ENERGY SOLUTIONS FOR BUSINESS AND MULTI-FAMILY: ENERGY MANAGEMENT

### CUSTOMER INFORMATION

\_\_\_\_\_  
Company Name (as listed on utility bill)

\_\_\_\_\_  
Legal Company Name

\_\_\_\_\_  
Customer Name (Name/Title)

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Customer Type

\_\_\_\_\_  
Federal Tax ID #

\_\_\_\_\_  
State Tax ID #

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
How did you hear about the program?

### FACILITY AND PROJECT INFORMATION

\_\_\_\_\_  
Facility Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Gas Account Number

\_\_\_\_\_  
Electric Account Number

\_\_\_\_\_  
Building Conditioned Square Footage

\_\_\_\_\_  
County

\_\_\_\_\_  
Facility Type

\_\_\_\_\_  
Average Monthly kW Demand

### PAYEE INFORMATION

\_\_\_\_\_  
Company name

\_\_\_\_\_  
Contact Person (Name/Title)

\_\_\_\_\_  
Incentive Check Mailing Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Federal Tax ID#

\_\_\_\_\_  
Tax Information

**CUSTOMER AUTHORIZATION AND SIGNATURE**

I agree to the terms and conditions of the Energy Solutions for Business Program and the specific program requirements for this measure.

I agree that this document and all notices and disclosures made or given relating to this document may be created, executed, delivered and retained electronically and that the electronic signatures appearing on this document and any related documents shall have the same legal effect for all purposes as a handwritten signature.

The information, statements, and documents I have provided in and with this document are true and accurate to the best of my knowledge. I am aware that if any of them are willfully false, I am subject to punishment.

By signing this application, the signatories agree to comply with the provisions of the New Jersey Prevailing Wage Act, N.J.S.A. 34: 11-56.26 et seq., (Act), if and to the extent that Act may apply to the work covered by this application.

If applicable, I authorize payment of the incentive to the third party listed in the payee information field of this application.

By participating in the company’s energy efficiency and peak demand reduction programs, customers agree their electric utility will maintain ownership of all capacity rights from electric savings measures, which refers to the demand reduction associated with any energy efficiency and peak demand reduction measure for which incentives were provided by the company. Your electric utility will aggregate these energy efficiency demand reduction attributes into the PJM capacity market as appropriate, with proceeds being used to reduce customers’ costs for the programs.

I certify that all information provided above is correct to the best of my knowledge, and I give the New Jersey Board of Public Utilities, NJ’s Clean Energy Program and participating electric and gas utilities and contractors permission to: 1) share the information I have provided above with all parties planning to do work on the facility I represent or evaluate its energy usage; 2) use, at no charge, any description or pictures relating to the work performed at this facility for the purposes of program administration, training and presentations; and 3) have reasonable access to this facility to inspect the work performed. I understand that all work is guaranteed for a period of one year.

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

*Applications signed by someone other than the customer require a letter of authorization.*

## SEM ASSESSMENT PRE-APPROVAL CHECKLIST

**Pre-Approval - the following must be included with all applications for pre-approval.**

1. Completed signed application.
2. A recent copy of your entire natural gas and electric utility bill showing societal benefits charge and commercial billing code.
3. W9 - this form must be completed by the entity receiving incentive payment.
4. If pursuing ASHRAE Level 2 assessment, provider must submit credentials indicating capability to perform this type of work and fill in table below:

Engineering / design firm or contractor			
Company name	Contact person (name / title)		
Mailing address	City	State	Zip code
Phone number	Email address		

5. ASHRAE Level 2 assessment cost proposal including:
  - Preliminary narrative facility description (envelope, HVAC, water heating, process systems, other energy consuming systems).
  - Energy efficiency measure / estimated cost breakdown table below must be included in the proposal. Enter personnel category and hourly rate, EEM, task hours, estimated annual savings, project cost and incentives (order of magnitude, eg 10,000 kWh / 500 therms), estimated payback. No detailed calculations are required for the initial proposal.

		Category 1	Category 2	Category 3								
		Cost Category										
		Analyst	Engineer	Sr. Engineer								
		Hourly Rate										
		enter personnel category ==>			enter personnel hourly rate ==>							
EEM #	Energy Efficiency Measure Name	# hours	# hours	# hours	EEM Study Cost	Estimated Savings kWh	Estimated Savings Therms	Estimated Project Cost	Estimated Incentives Electric	Estimated Incentives Gas	Estimated Payback w/o Incentive	Estimated Payback w / Incentive
Example	Reduce Hot Water Temperature	0	1	1	\$400.00	0	600	\$100.00	\$0.00	\$0.00	6 months	N/A
1												
2												
3												
4												
5												
6												
Subtotal		0	0	0	\$0.00	0	0	\$0.00	\$0.00	\$0.00		
Additional Itemized Expenses												
Example	Site Visits				\$3,000.00							
1												
2												
3												
Subtotal Additional Itemized Expenses					\$0.00							
Grand Total Proposal Cost					\$0.00							

## SEM ASSESSMENT FINAL APPROVAL CHECKLIST

**Final Approval - the following must be submitted for final approval:**

1. ASHRAE Level II Assessment report for review / comment / approval.
2. Invoice for ASHRAE Level II Assessment.
3. Low / no cost measure installation completion documentation (date of completion, costs, savings).

## BOC CERTIFICATION TRAINING PRE-APPROVAL CHECKLIST

The following must be included with all applications for pre-approval:

1. Completed signed application.
2. A recent copy of your entire natural gas and electric utility bill showing societal benefits charge and commercial billing code.
3. Attendee information – please fill in table below:

Company name	Attendee name	Attendee job title
Attendee telephone	Attendee email	Main facility address assigned to
		Facility square footage
BOC course	Starting date	Class location

## BOC CERTIFICATION TRAINING FINAL APPROVAL AND PAYMENT CHECKLIST

The following must be included with all applications for final approval:

1. BOC Level I or BOC Level II Training Certificate of Completion.
2. Proof of payment.
3. W9 for payee.

## ETG SMART ENERGY PARTNERS TERMS AND CONDITIONS

### ELIGIBILITY

1. This application package must be received by the Program Administrator on or before June 30, 2023 in order to be eligible for the fiscal year 2023 (July 1, 2022 to June 30, 2023) incentives. All participating customers are required to submit the most current application form.
2. All submissions will be reviewed based on the current program requirements and incentive levels approved by the New Jersey Board of Public Utilities (NJBPU). Program Incentives are available to non-residential Elizabethtown Gas commercial, industrial and multi-family customers who pay a Societal Benefit Charge. Multi-family customers are defined as three or more units. Customers who have not contributed to the utility Societal Benefits Charge are not eligible for incentives offered through this program.
3. Elizabethtown Gas requires a complete, separate application for each customer utility account. Projects for the same utility account and the same technology being done at the same time should be submitted on one application.
4. All applicants are required to obtain the Program Administrator's pre-approval and incentive commitment prior to purchasing equipment and commencing installation or construction. Customers implementing projects without the Program Administrator's approval do so at their own risk, including, among other things, the risk of having their project deemed ineligible for incentives.
5. In order to be eligible for program incentives, a participating customer or an agent (contractor/vendor) authorized by a participating customer, must submit a properly completed application package that is signed by the participating customer. A complete application package should include all documentation listed in the checklist section of the application.
6. Applications signed by someone other than the customer require a letter of authorization.
7. Project invoices should list both the labor and material costs separately. The invoice should include a description of the equipment installed, quantity, and unit price.
8. For projects that are self-installed by the participating customer, in addition to the material invoices listing the equipment installed, quantity, and unit price, written documentation from the participating customer must be provided in lieu of a labor invoice attesting to the start and end dates of the self- installation.
9. Energy Efficient Measures must be installed in buildings located within Elizabethtown Gas' service territory and designated on the participating customer's incentive application. Installations must be completed in accordance with all laws, codes and other requirements.
10. Program incentives are available for qualified Energy-Efficient Measures as listed and described in program materials and incentive applications.
11. The participating customer must ultimately own the equipment through an up-front purchase. Equipment procured by participating customers through other programs offered by New Jersey's Clean Energy Program or Elizabethtown Gas, as applicable, are not eligible for incentives through this program.
12. Incomplete application submissions, applications requiring inspections and unanticipated periods of high volume may cause processing delays.
13. By participating in the Company's energy efficiency and peak demand reduction programs, customers agree their electric utility will maintain ownership of all Capacity Rights from electric savings measures, which refers to the demand reduction associated with any energy efficiency and peak demand reduction measure for which incentives were provided by the Company. Your electric utility will aggregate these energy efficiency demand reduction attributes into the PJM capacity market as appropriate, with proceeds being used to reduce customers' costs for the programs.
14. If applying for incentives for natural gas and electric measures at the same time through Elizabethtown Gas, it is prohibited to apply for the same incentive with your electric company.



## INCENTIVE AMOUNTS

1. Program Incentives will not exceed the lesser of:
  - a. The approved Program incentive amount, or
  - b. The total project cost of the Energy-Efficient Measure.
    - i. Project cost is the expense directly associated with the Energy Efficient Measure, excluding NJ state sales tax.
2. Products offered at no direct cost to the participating customer are ineligible.
3. Program Incentives are limited to \$250,000 per utility account in a fiscal year.
4. All offers are subject to available funding. Elizabethtown Gas reserves the right, with approval of the NJBPU to terminate, modify, suspend or extend this Program.

## PRE- AND POST-INSPECTIONS

1. Projects are subject to the Program's random inspection selection process.
2. The Program must have reasonable access to participating customer's facility to post inspect the Energy-Efficient measures installed under this Program.
3. ETG and/or their designees including program administrators and evaluation contractors reserve the right to review installations to verify completion and measure energy savings to ensure compliance with all program requirements before issuing the rebate. Such reviews will be made at a time convenient to the applicant. Misrepresentation of installation location or measure eligibility may result in forfeiture of the rebate.

## DEFICIENT APPLICATIONS

1. If an application package is incomplete, information is missing or deemed insufficient, the customer (or customer's representative) will be contacted via email. The information or documentation requested on the email must be received by the Program Administrator within 30 days of the date of the request. If additional deficiencies are still noted, there will be a follow-up email sent. .
2. If a participating customer fails to respond to information requests within 30 days the application will be rejected. If an application is rejected, participating customers may re-apply under the program incentives and requirements in place at the time of re-application.

## EXPIRATIONS

1. Pre-approved projects are given a one-year approval in which the proposed measures are to be installed and operational. An email is sent 30 days prior to project expiration. The participating customer will have 30 days to either submit a request for an extension OR submit final project paperwork. If no response is received within 30 days of expiration, the project will be cancelled.
2. Extension requests must be in writing from the participating customer and include the circumstances that led to the extension request, and the percentage of the project completed.
3. Extension requests may be granted for a period no longer than six (6) months. The Program Administrator may provide up to two six-month extensions from the original approval expiration date.
4. Upon expiration, if the project has not started and the participating customer is still interested in installing the equipment, the existing application will be cancelled and a new application package must be submitted, which will be reviewed under the program incentives and requirements in place at the time of re-submittal.

## CHANGE IN PARTICIPATING CUSTOMER NAME/PAYEE AFTER PRE-APPROVAL

1. To initiate a change to the participating customer name or payee on an approved application, the following documentation must be provided:
  - a. Documentation from the participating customer authorizing the change
  - b. A new, fully signed application reflecting the updated participating customer or payee name.
  - c. For name change of the applicant/customer, a utility bill in the name of the new participating customer is required.
  - d. All such change requests are subject to Program Administrator approval.
  - e. Certain requests may require additional information to be submitted as defined by the Program Administrator.



## TAX LIABILITY

The Program Administrator and Elizabethtown Gas will not be responsible for any tax liability that may be imposed on any participating customer as a result of the payment of program incentives. All Participating Customers must supply their federal tax identification number or social security number to the Program Administrator on the application form in order to receive a Program Incentive.

## PREVAILING WAGE

Participating projects with a contract at or above current prevailing wage contract threshold amount set pursuant to the New Jersey Prevailing Wage Act (N.J.S.A. 34:11-56.25 et seq.) are required to pay no less than prevailing wage rate to workers employed in the performance of any construction undertaken in connection with New Jersey Board of Public Utilities financial assistance, or undertaken to fulfill any condition of receiving New Jersey Board of Public Utilities financial assistance, including the performance of any contract to construct, renovate or otherwise prepare a facility, the operations of which are necessary for the receipt of New Jersey Board of Public Utilities financial assistance. By submitting an application, or accepting program incentives, applicant agrees to adhere to New Jersey Prevailing Wage requirements, as applicable. By signing the application, the signatories agree to comply with the provisions of the New Jersey Prevailing Wage Act, N.J.S.A. 34: 11-56.25 et seq., (Act), if and to the extent that Act may apply to the work covered by the application.

More information can be found at [https://www.nj.gov/labor/wagehour/regperm/public\\_contracts\\_general.html](https://www.nj.gov/labor/wagehour/regperm/public_contracts_general.html)

## ENDORSEMENT

The Program Administrator and Elizabethtown Gas do not endorse, support or recommend any particular manufacturer, product or system design in promoting this Program.

## WARRANTIES

THE PROGRAM ADMINISTRATOR AND ELIZABETHTOWN GAS DO NOT WARRANT THE PERFORMANCE OF INSTALLED EQUIPMENT, AND/OR SERVICES RENDERED AS PART OF THIS PROGRAM, EITHER EXPRESSLY OR IMPLICITLY. NO WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER STATUTORY, EXPRESSED, OR IMPLIED, INCLUDING, WITHOUT LIMITATIONS, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE REGARDING EQUIPMENT OR SERVICES PROVIDED BY A MANUFACTURER OR VENDOR QUALIFY. CONTACT YOUR VENDOR/SERVICES PROVIDER FOR DETAILS REGARDING PERFORMANCE AND WARRANTIES.

## LIMITATION OF LIABILITY

By virtue of participating in this Program, Participating Customers agree to waive any and all claims or damages against the Program Administrator and Elizabethtown Gas, except the receipt of the Program Incentive. Participating Customers agree that the Program Administrator and Elizabethtown Gas' liability, in connection with this Program, is limited to paying the Program Incentive specified. Under no circumstances shall the Program Administrator and Elizabethtown Gas, its representatives, or subcontractors, be liable for any lost profits, special, punitive, consequential or incidental damages or for any other damages or claims connected with or resulting from participation in this Program. Further, any liability attributed to the Program Administrator or Elizabethtown Gas under this Program shall be individual, and not joint and/or several.

## TERMINATION

This Program is subject to New Jersey Board of Public Utilities (NJBPU) regulatory rules and orders. Elizabethtown Gas reserves the right to change any portion of the Program or end this Program without notice.

## **PARTICIPATING CUSTOMER'S CERTIFICATION**

Participating Customer certifies that he/she purchased and installed the equipment listed in their application at their defined New Jersey location. Participating Customer agrees that all information is true and that he/she has conformed to all of the Program and equipment requirements listed in the application.

## **ACKNOWLEDGEMENT**

The applicant gives the Program Administrator permission to share records with the Elizabethtown Gas, and contractors it selects to manage, coordinate or evaluate the NJ Smart Energy Partners Program including the release of electric and natural gas utility billing information, as well as make available to the public any and all information required by the Open Public Records Act and/or other applicable laws.

## **DEFINITIONS**

NJBPU – New Jersey Board of Public Utilities

Energy Efficient Measures – Any device eligible to receive a program incentive payment through the program.

Participating Customers – Elizabethtown Gas customers and multi-family customers who pay a Societal Benefit Charge. Multi-family customers are defined as three or more units.

Product Installation or Equipment Installation - Installation of the Energy Efficient Measures.

Program – NJ Smart Energy Partners Program

Program Administrator – Applied Energy Group (AEG)