

Ready to get your rebate? Follow these simple steps.

This application is for projects completed between January 1, 2024 and December 31, 2024. To request pre-approval, this application must be completed, signed, and submitted with all required documentation prior to project initiation, ordering equipment, or issuing purchase orders. Rebates are available on a first-come, first-served basis. For more detailed information, refer to the Terms and Conditions included with this application. Please call 877.296.4319 or email info@michigan-energy.org if you have questions about the application and/or pre-approval before you begin your project and prior to ordering any equipment.

Annual Member Rebate Cap

- » Business or farm with a commercial utility rate code—\$10,000 cap.
- » Farm with a residential utility rate code—\$6,000 cap.

Rebate Offer: Rebates for custom measures are paid at \$0.07 per annual kWh savings (projected) or 75 percent of the project cost, whichever is lower.

Step 1 Determine Eligibility

Equipment must be new (used equipment is not allowed) and installed in a commercial, industrial, or farm facility that is a HomeWorks Tri-County Electric Co-op electric member, as well as meet minimum requirements set forth in this document. Projects must result in reduced electric energy usage due to improvement in the system efficiency. Projects involving efficient electrification (fuel switching to electricity from site use of fossil fuel) may be permitted if the project 1) reduces total annual site energy consumption; and 2) results in reduced greenhouse gas emissions from energy use over the life of the electrification measure.

Step 2 Submit an Application for Pre-Approval

Application must have complete information and should be submitted for pre-approval with:

- An IRS Form W-9 for payee (or Section 5 on page 2 of this application).
- The entire completed application. If this is a pre-approval request, Section 6 on page 2 of this form need not be signed at this time. If project is already complete, Section 6 must be signed.
- Description of project, energy savings estimates (clear and well documented), vendor proposal with pricing, and equipment specs/data sheets per the instructions on Pages 3 and 4.
- A copy of a recent month's electric utility bill.

Step 3 Receive Pre-approval

Energy Optimization program staff will review the application materials and submit any follow-up questions to the member and the associated vendor. If the project meets the pre-approval criteria, the member will receive an email or letter indicating the project is pre-approved and funds are reserved for the project.

- Incomplete Custom Applications will cause delays.
- If you are applying for a custom rebate after the project is complete, your application will be reviewed and considered on a case-by-case basis.

Step 4 Install Equipment

After returning the initial custom application and receiving pre-approval, the project may begin.

Step 5 Notify the Program of Project Completion

Once your project is complete, contact your Energy Optimization program energy advisor or email info@michigan-energy.org. Provide the project completion date, the final project cost and supporting invoices, and identify any relevant changes that occurred since the project was originally pre-approved. Submit your documents as indicated below. Some projects may require site verification before the rebate can be processed. If this is the case, we will contact you to schedule a visit.

Step 6 Payment

Once completed paperwork is submitted, your final application will be reviewed and processed for payment. Rebate payments are usually mailed within six to eight weeks.

Submit your documents one of three ways:



Fax
608.646.7682



Mail
HomeWorks Energy Optimization
431 Catalyst Way
Madison, WI 53719



Email
info@michigan-energy.org

Call **877.296.4319** for questions about this application.

SECTION 1: Co-op Member Information (please print)

2024 Energy Optimization Application

Co-op Member Name (as shown on your electric utility bill):			
Co-op Member Mailing Address:	City:	State:	ZIP:

SECTION 2: Job Site Information

Job Site Name (if different than member name):	Project Contact Person Name:		
Project Contact Telephone: <input type="checkbox"/> Home/Office Number <input type="checkbox"/> Mobile Number	Project Contact Email:		
Job Site Street Address (physical location):	City:	State: MI	ZIP:
Electric Utility Company at Job Site:	Electric Utility Acct #:	Project Completion Date:	
What is the predominant use of the building space where equipment was installed? (check one) <input type="checkbox"/> Office <input type="checkbox"/> Retail <input type="checkbox"/> Warehouse <input type="checkbox"/> Restaurant <input type="checkbox"/> Grocery/Supermarket <input type="checkbox"/> Manufacturing <input type="checkbox"/> Lodging <input type="checkbox"/> School: K-12 <input type="checkbox"/> School: College <input type="checkbox"/> Healthcare facility <input type="checkbox"/> Farm (commercial meter) <input type="checkbox"/> Farm (residential meter) <input type="checkbox"/> Other/Miscellaneous _____			

SECTION 3: Trade Ally (Contractor) Information

Trade Ally Name (or indicate if self install):	Trade Ally Contact Person Name:		
Trade Ally Telephone:	Contact Email:		
Trade Ally Mailing Address:	City:	State:	ZIP:

SECTION 4: Payee and Mailing Address

Make Rebate Check Payable to (payee): <input type="checkbox"/> Co-op Member <input type="checkbox"/> Landlord <input type="checkbox"/> Trade Ally or other third party (See <i>Third-Party Payees</i> section of Terms and Conditions for details.) ONLY IF rebate is being made payable to a third-party landlord or trade ally per check box above, the co-op member must confirm this rebate reassignment arrangement by signing below: I, the co-op member, am authorizing reassignment of the rebate payment to the third-party payee named herein (in Section 5 below or payee IRS Form W-9), and I understand that I will not be receiving the rebate payment. I also understand that my release to a third-party does not exempt me from the program requirements outlined in the Terms and Conditions.			
Co-op Member Signature: /s/	Print Name:	Title:	Date:
Mail Check to: <input type="checkbox"/> Co-op Member Mailing Address (entered at top of this page) <input type="checkbox"/> Job Site Address <input type="checkbox"/> Payee W-9 Address <input type="checkbox"/> Alternate Pay Address (complete below)			
Alternate Pay Address (if checked above):	City:	State:	ZIP:

SECTION 5: Payee IRS Form W-9 Information (Submit IRS Form W-9 for payee OR fill out this section completely. This section may be omitted only if IRS Form W-9 for payee is submitted.)

Payee Legal Name (as shown on income tax return):	Payee Business Name (if different than payee legal name):		
Payee Legal Address:	City:	State:	ZIP:
Check the appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Other tax exempt organization or govt. agency <input type="checkbox"/> LLC - Enter the tax classification (C = C corporation, S = S corporation, P = partnership): _____ Note: For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.			
Payee Tax Identification Number (TIN) (Complete ONE only. Must match payee legal name above.) FEIN #: _____ - _____ OR SSN: _____ - _____ - _____			
Certification: The following certifications are required in order for this form to substitute for the IRS Form W-9. Under penalties of perjury, I certify that: 1. The payee's TIN is correct. 2. The payee is not subject to backup withholding due to failure to report interest and dividend income. 3. The payee is a U.S. citizen. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.			
Payee Signature: /s/	Print Name:	Title:	Date:

SECTION 6: Co-op Member Signature (please read and sign)

The undersigned agrees that the stated energy-efficient measure(s) was (were) installed at the job site address listed above as part of the Energy Optimization program. I have read and agree to the Terms and Conditions within this application. I agree to verification of equipment installation, which may include a site inspection by a program or utility representative. I understand that I am not allowed to receive more than one rebate from this program on any individual piece of equipment. I hereby agree to indemnify, hold harmless, and release the utility and program administrator from any actions or claims in regard to the installation, operation, and disposal of equipment (and related materials) covered herein, including liability from any incidental or consequential damages. To the best of my knowledge, the statements made on this application are complete, true, and correct, and I have submitted the appropriate supporting documentation to receive a rebate. I have elected to utilize electronic signatures. I understand and intend that a legal signature is formed by typing my name on this document. If any of the parties do not wish to sign this document electronically, all must opt out together and print a paper copy to sign manually.

Co-op Member Signature: /s/	Print Name:	Title:	Date:
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Custom Lighting Worksheet

These rebates are available for energy-saving measures that are not covered by the prescriptive lighting portion of the program. Custom rebates are based on the first-year electrical energy (kWh) savings.

When applying for pre-approval, submit the following items:

- Information in Sections 1 - 3 on page 2.
- Completed Custom Worksheet (below)
- Itemized quote/proposal for all related materials and any external (third-party) labor.
- Manufacturer's specification sheets for all equipment.

Custom Rebate Rate: \$0.07 per kWh saved

- In lieu of filling out these tables, calculations may be submitted in an unlocked spreadsheet (such as Excel).
- All new light fixtures and retrofit systems should be ENERGY STAR® or DLC qualified.

Existing Fixture #1		New Fixture #1	
Description:		Description:	
Watts per Fixture (A)		Watts per Fixture (E)	
Quantity of Fixtures (B)		Quantity of Fixtures (F)	
Annual Operating Hours (C)		Annual Operating Hours (G)	
Annual kWh Consumption (D) (A x B x C / 1,000)		Annual kWh Consumption (H) (E x F x G / 1,000)	
Annual Energy Savings (D - H): _____ kWh			

Existing Fixture #2		New Fixture #2	
Description:		Description:	
Watts per Fixture (A)		Watts per Fixture (E)	
Quantity of Fixtures (B)		Quantity of Fixtures (F)	
Annual Operating Hours (C)		Annual Operating Hours (G)	
Annual kWh Consumption (D) (A x B x C / 1,000)		Annual kWh Consumption (H) (E x F x G / 1,000)	
Annual Energy Savings (D - H): _____ kWh			

Total Custom Lighting Project Cost:	\$
Total Annual Energy Savings (kWh) x \$0.07/kWh: (Cannot exceed 75% of the total project cost)	\$

Note: Member acknowledges and agrees that Member cannot apply for, nor receive, rebates for the same product, equipment or service from more than one utility unless there are both electric and gas savings.



Custom Non-Lighting Worksheet

These rebates are available for energy-saving measures that are not covered by other prescriptive portions of the program. Custom rebates are based on the first-year electrical energy (kWh) savings. For efficient electrification (fuel-switching) projects, annual energy savings in a neutral unit of measure (such as kBTU/yr) will be converted to kWh/yr for the purpose of calculating the custom rebate amount.

When applying for pre-approval, submit the following items:

- Information in Sections 1 - 3 on page 2.
- Completed Custom Worksheet (below)
- Itemized quote/proposal for all related materials and any external (third-party) labor.
- Manufacturer's specification sheets for all equipment.

Custom Rebate Rate: \$0.07 per kWh saved

1. Provide a detailed written description of the project.
2. Provide clear and logical step-by-step calculations detailing the estimated annual energy savings (kWh).
 - a) Submit calculations in an unlocked spreadsheet format (such as Excel). Do not send PDF copies of spreadsheets. Include page numbers, if needed to reference calculations or numbers on other pages.
 - b) Provide detailed and orderly calculations that can be followed without prior knowledge of the project.
 - c) Document any assumptions and inputs to calculations (e.g., hours of operation, load factor, power factor, motor efficiencies, etc.) and maintain consistency throughout calculations.
 - d) Identify key numbers (circled, bold, highlighted, etc.) and show correct units.

Estimated Custom Non-Lighting Project Savings

	Measure Description ^a	Annual Energy Savings (kWh)	Measure Cost (\$) ^{b,c,d}
1			\$
2			\$
3			\$
4			\$

^a Measure description refers to specific energy efficient project components (i.e. chiller replacement, industrial process improvement, etc.)

^b Measure cost is either the cost to remove/replace existing operational equipment, or it is the incremental cost to upgrade non-operational equipment from standard efficiency to high efficiency equipment.

^c Costs itemized by measure are preferred.

^d Include contracted labor costs, sales tax, disposal, permit fees, etc., related to the project.

Total Custom Non-Lighting Project Cost:	\$
Total Annual Energy Savings (kWh) x \$0.07/kWh: (Cannot exceed 75% of the total project cost)	\$

Note: Member acknowledges and agrees that Member cannot apply for, nor receive, rebates for the same product, equipment or service from more than one utility unless there are both electric and gas savings.

How did you learn about the program?

- My Utility
 Utility Website
 Newspaper
 Community Event
 Mail/Bill insert
 Contractor
 Other



2024 Rebate Application Application Terms & Conditions

REBATE OFFER: Projects must be implemented (completed) between January 1, 2024 and December 31, 2024. Complete application must be submitted no later than December 31, 2024. Projects must result in reduced electric energy usage due to improvement in the system efficiency. Projects involving efficient electrification (fuel switching to electricity from site use of fossil fuel) may be permitted if the project 1) reduces total annual site energy consumption; and 2) results in reduced greenhouse gas emissions from energy use over the life of the electrification measure. Reduced electric use resulting from peak shaving, demand limiting, power generation, renewable energy (including solar PV and wind), or operating schedule changes will not qualify. This application form is for facilities with a commercial or industrial electric meter or rate code. Farms with a residential or commercial meter may also apply. Other businesses with a residential meter must use the residential programs.

COMPLIANCE: a) All projects must comply with applicable federal, state, and local laws, and building codes. b) All equipment must be new or retrofitted with new components per the program specifications. Used equipment is not eligible for rebates. Leased equipment must receive pre-approval BEFORE project initiation or entering into the equipment lease. Existing equipment must be permanently disconnected or removed and not reused elsewhere. c) New equipment must meet specification requirements. d) For prescriptive programs, new equipment must be operational when the application is submitted. e) Only one rebate will be granted for each project. f) Members may submit multiple projects in a calendar year; however, the rebate totals may not exceed the annual rebate cap without utility authorization. g) New construction projects will be considered with prior review and authorization. Note that the measures and rebates listed on the application form are typically intended for retrofit projects; not all measures listed may be available for new construction projects. h) If the project is in a leased building, the term of the lease must be at least three (3) years and a copy of the lease may be requested. i) Up to 24 months of utility usage information may be requested.

DELIVERY: Applications must be delivered via mail to HomeWorks Energy Optimization Programs, 431 Catalyst Way, Madison, WI 53719, emailed to info@michigan-energy.org, or faxed to 608.646.7682.

PRESCRIPTIVE APPLICATIONS: Pre-approval is not required for prescriptive rebates unless otherwise specified. However, a rebate will not be provided for projects or equipment that does not precisely meet the requirements provided on the prescriptive application form. Applications must have complete information and be submitted with the supporting documentation specified on the form instructions. Unless otherwise specified, rebates for prescriptive measures may not exceed 75 percent of the total project cost, including materials, sales tax, external labor (i.e. contracted labor), permits, equipment rental, and disposal.

CUSTOM APPLICATIONS: Pre-approval is strongly encouraged for all custom projects. If your project does not fit the descriptions on the standard prescriptive rebate application form, it may qualify for a custom rebate. Applications must have complete information and be submitted with the calculations and supporting documentation specified on the form instructions. Unless otherwise specified, rebates for custom measures may not exceed 75 percent of the total project cost, including materials, sales tax, external labor (i.e. contracted labor), permits, equipment rental, and disposal. Note: Internal labor (i.e. non-contracted labor) may not be included in the cost of the project.

PAYMENT: Once completed paperwork is submitted, rebate payments are usually mailed within six to eight weeks. Rebate payments are made by check, and may arrive in multiple checks. Incomplete applications will either delay payments or result in denial of application approval. HomeWorks Tri-County Electric Co-op reserves the right to refuse payment and participation if the member or trade ally violates program terms and conditions. HomeWorks Tri-County Electric Co-op must receive 100 percent of the energy savings for the rated life of the product(s) or for a period of three (3) years from receipt of rebate, whichever is less. If the project does not provide the energy savings, if the facility in which the installed projects are located closes or ceases operation within three (3) years from receipt of rebate, or if you cease to be a member of HomeWorks Tri-County Electric Co-op during the following three (3) years, you shall refund a prorated amount of rebate dollars based on the time installed.

THIRD-PARTY PAYEES: The HomeWorks Tri-County Electric Co-op member may authorize payment of the rebate directly to a landlord, trade ally, or other third-party payee by selecting the appropriate box in Section 4 on page 2 of the application. If the co-op member chooses to reassign their rebate to a third-party, the member must sign the release in Section 4 and the third-party payee must be identified in the completed Section 5 or on the payee's IRS Form W-9. Program staff reserve the right to contact the member to confirm third-party payee requests.

TRADE ALLY INFORMATION: The term "trade ally" refers to the company or contractor who provides or installs equipment for the HomeWorks Tri-County Electric Co-op member. If the project was completed by more than one trade ally (e.g., equipment was purchased from one trade ally but installed by another) and the rebate is being paid to the co-op member, enter the information of the trade ally who installed the equipment in the Trade Ally (Contractor) Information section on page 2 of the application. Trade allies participating in the program must adhere to standards of acceptable business behavior and performance.

INSPECTION: Program staff reserve the right to conduct pre-inspections and post-inspections of proposed and installed projects. Some projects may require site verification or phone verification before the rebate will be processed.

PUBLICITY: HomeWorks Tri-County Electric Co-op reserves the right to publicize your participation in this program, unless you specifically request otherwise.

PROGRAM DISCRETION: Rebates are available on a first-come, first-served basis. Rebate amounts and offerings are subject to change or termination without notice at the discretion of HomeWorks Tri-County Electric Co-op.

LOGO USE: Members or trade allies may not use the HomeWorks Tri-County Electric Co-op name or logo in any marketing, advertising, or promotional material without written permission.

DISCLAIMERS: HomeWorks Tri-County Electric Co-op: a) does not endorse any particular manufacturer, product, labor, or system design by offering these programs; b) will not be responsible for any tax liability imposed on the member as a result of the payment of rebates; c) does not expressly or implicitly warrant the performance of installed equipment or contractor's quality of work (contact your contractor for detailed warranties); d) is not responsible for the proper disposal/recycling of any waste generated as a result of this project; e) is not liable for any damage caused by the installation of the equipment or for any damage caused by the malfunction of the installed equipment; f) is not responsible for items (rebate applications, supporting documentation, and/or rebate checks) lost or damaged in the mail.

ELIGIBILITY: These rebates are offered to HomeWorks Tri-County Electric Co-op members with active electric service in Michigan only. For questions regarding eligibility, call 877.296.4319.

INFORMATION RELEASE: The member requests and authorizes HomeWorks Tri-County Electric Co-op to release electric usage for the preceding 24 months to Energy Optimization program staff, in order to participate in the program. The authorization to release information expires automatically two (2) years after signature date. The member agrees that the Energy Optimization program and their contractors may include the member's name, address, electric account number, electric services, and resulting energy savings ("Information") in a database hosted by a contractor of the Energy Optimization program and such information may be included in reports or other documentation submitted to HomeWorks Tri-County Electric Co-op, and their contractors and/or the Michigan Public Service Commission ("Reports"). Such parties will treat such Information as confidential and the Information in the Reports shall only be in the aggregate.

RELEASE/INDEMNIFICATION: Payment of rebates under the Energy Optimization program and/or evaluation of applications for rebates shall not deem the Energy Optimization program or any of its affiliates, employees, contractors, or agents ("Energy Optimization Parties") to be responsible for any work completed in connection herewith. The applicant fully releases Energy Optimization Parties from any and all claims it may have against Energy Optimization Parties in connection with this application, the rebates, or the work performed in connection with them. In addition, the applicant agrees to defend, indemnify and hold Energy Optimization Parties harmless from and against any and all claims, losses, demands, or lawsuits by any third parties arising in connection with this application, the payment or non-payment of rebates, or any work performed in connection with them. The member hereby releases HomeWorks Tri-County Electric Co-op from any and all liability arising from or connected with releasing the information to the Energy Optimization program set forth herein.

NON-DISCLOSURE: The Energy Optimization program agrees not to disclose project information, such as pricing, proprietary equipment specifications, or other intellectual property. Such information will be used by Energy Optimization program staff only for the purpose of validating and fulfilling rebate applications. Such information will not be shared outside of the Energy Optimization program.

ANNUAL MEMBER REBATE CAP: Rebates are available on a first-come, first-served basis; apply early. Rebate budgets are limited, therefore total annual rebate amount per member may be limited as follows: Business or farm with a commercial utility rate code – \$10,000 cap. Farm with a residential utility rate code – \$6,000 cap. If a larger rebate amount is needed to enable your project to move forward, please call to request pre-approval prior to beginning your project.