CONSERVE & $AVE

COMMERCIAL GEOTHERMAL & AIR SOURCE HEAT PUMPS REBATE APPLICATION

1. CUSTOMER INFORMATION (please print)

Business Name | Location Name or DBA (if different from Business Name)

Installation Address | City | State | Zip Code

Mailing Address (if different from above) | City | State | Zip Code

Account Number

❑ **Apply rebate to our account.** ❑ **Send us a rebate check.**

Type of Business ❑ Office ❑ Restaurant ❑ Retail ❑ Warehouse ❑ Grocery
❑ Health ❑ Lodging ❑ School ❑ Industrial ❑ Miscellaneous Commercial

Facility Size (sq. ft.)_____ ❑ Own ❑ Rent/Lease Hours of Operation (i.e., 9am-5pm) M–F_____ SAT_____ SUN_____

How did you hear about **CONSERVE & SAVE**? ❑ Radio ❑ TV ❑ Newspaper ❑ Billboard ❑ Retailer/Vendor ❑ Contractor
❑ Utility Representative ❑ Utility Mailing ❑ Utility Newsletter ❑ Utility Web Site ❑ Other _____

2. CONTACT INFORMATION (please print)/CUSTOMER SIGNATURE

ATTENTION: ALL INVOICES OR RECEIPTS AND ALL SPECIFICATION SHEETS MUST BE INCLUDED WITH YOUR FULLY-COMPLETED AND SIGNED APPLICATION OR APPLICATION WILL BE RETURNED.

Contact Name | ( ) Daytime Phone Number

Email | ( ) Fax Number

I certify that all the information in the application (including any associated worksheets) is correct to the best of my knowledge. I have read and agree to the Terms and Conditions on the back of this application booklet. I understand that if any equipment in conjunction with this application is ordered, purchased, or installed before approval from The Utility is received, the proposed project may not qualify for a rebate.

Customer's Signature | Date

❑ **Check here if you DO NOT give us permission to use your business name in advertising our Conserve & Save program (e.g. utility web site, newspaper ads).**

3. CONTRACTOR/VENDOR INFORMATION (please print)

Company Name

Address | City | State | Zip Code

Contact Name | ( ) Daytime Phone Number

Email | ( ) Fax Number

OFFICE USE ONLY **Pre-Inspected?** ❑ **YES** ❑ **NO** **Date**_____ **Initials**_____

Date Received_____ **Post-Inspected?** ❑ **YES** ❑ **NO** **Date**_____ **Initials**_____

TOTAL REBATE AMOUNT

$

TEAMING UP **TO SAVE YOU MONEY!**

4. REBATE INFORMATION – GEOTHERMAL HEAT PUMPS (please print)

Project Type: ❑ RETROFIT ❑ NEW CONSTRUCTION

EXISTING (OLD) SYSTEM (if applicable):

COOLING			HEATING		
Code *(Table 1)*	**Size of Unit** *(BTU's or Tons)*	**Rated Efficiency** *(enter value, then check SEER* or EER*)*	**Equipment Type** *(Furnace, Boiler, etc.)*	**Rated Input** *(BTU's)*	**Rated Efficiency** *(enter value, then check HSPF* or AFUE*)*
1.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
2.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
3.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
4.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
5.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
6.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE
7.		❑ SEER ❑ EER			❑ HSPF ❑ AFUE

TABLE 1 – Existing Cooling Equipment Types

Code	Equipment Description
UT-1	Less than 65,000 BTU/hour
UT-2	65,000 – 134,999 BTU/hour
UT-3	135,000 – 239,999 BTU/hour
UT-4	240,000 BTU/hour and greater
PTAC	Packaged Terminal Units (all sizes)
C-1	Screw Chiller – Less than 150 Tons
C-2	Screw Chiller – 150 to 299 Tons
C-3	Screw Chiller – 300 Tons and greater
C-4	Centrifugal Chiller – Less than 150 Tons
C-5	Centrifugal – 150 to 299 Tons
C-6	Centrifugal – 300 Tons and greater

***Efficiency Ratings by ARI (www.aridirectory.org):**

AFUE = Annual Fuel Usage Efficiency
COP = Coefficient of Performance
EER = Energy Efficiency Rating (low speed)
HSPF = Heating Seasonal Performance Factor
SEER = Seasonal Energy Efficiency Rating

NEW SYSTEM:

Date Installed: _____ **Project Cost:** *(materials and labor)* **$** _____

Loop Type: ❑ **Horizontal** ❑ **Vertical** ❑ **Slinky**

Total Cooling Capacity: _____ **BTU's** **Total Heating Capacity:** _____ **BTU's** **Supplemental Heat Installed:** ❑ **No** ❑ **Yes** **kW** _____

Desuperheater Installed? ❑ **Yes** ❑ **No** **Water Heating:** ❑ **Electric** ❑ **Gas** **Size of Water Heater in Gallons:** _____

GEOTHERMAL HEAT PUMPS:

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Code *(Table 2)*	**Manufacturer Name**	**Model Number**	**Size** *(Tons)*	**Qty.**	**Annual Cooling Hours**	**Annual Heating Hours**	**ARI Reference Number****	**Minimum EER** *(Table 2)*	**Rated EER**	**Rated COP**	**Base Rebate** *(D x E x $200)*	**EER Bonus Rebate** *(J – I) x (D x E x $25)*	**Total Rebate** *(L + M)*
1.											**$**	**$**	**$**
2.											**$**	**$**	**$**
3.											**$**	**$**	**$**
4.											**$**	**$**	**$**
5.											**$**	**$**	**$**
6.											**$**	**$**	**$**
											DESUPERHEATER REBATE: Qty: _____ **X $250**		**$**

TOTAL REBATE AMOUNT **$**

** ***Water-to-Air Heat Pump:*** *The efficiency ratings are determined using the Air Conditioning and Refrigeration Institute's (ARI) directory, which may be found at www.aridirectory.org.*
Water-to-Water Heat Pump: *The efficiency ratings are verified using manufacturer specifications, which clearly demonstrate the Entering Water Temperature (EWT), Gallons Per Minute (GPM) water flow, and the associated EER rating.*

TABLE 2 – Geothermal Heat Pump Systems – Qualifying Efficiencies and Rebate Schedule

Code	Qualifying Equipment	Minimum Efficiency	Base Rebate ($/Ton)	EER Bonus Rebate ($/Ton)
GeoX-CL	Closed-Loop Geothermal Heat Pump	14.1 EER and 3.3 COP	$200	$25
GeoX-OL	Open-Loop Geothermal Heat Pump	16.2 EER and 3.6 COP	$200	$25
GeoX-DX	Direct Expansion Geothermal Heat Pump	15.0 EER and 3.5 COP	$200	$25

EER Bonus Rebate provides an additional incentive for each 1.0 EER above the Minimum Efficiency.

Qualifying Geothermal Heat Pump systems must have been tested in accordance with the ARI Test Standard test procedures and have nameplate data stamped with a qualifying EER and COP.

GEOTHERMAL HEAT PUMP SYSTEMS – INSTALLATION CHECKLIST (please print)

THE CONTRACTOR MUST COMPLETE THE FOLLOWING ITEMS AND REVIEW THIS CHECKLIST IN THE PRESENCE OF THE OWNER!

- ❑ 1. The heat pump unit(s) is(are) resting on a one piece, sound absorbing pad that completely supports the base of the unit(s), or is suspended with recommended hangers and fittings that completely isolate noise and vibrations from any living areas.
- ❑ 2. The size, location, and configuration of the complete heat pump system is as promised in the purchase agreement.
- ❑ 3. All major components of the heat pump system have been identified and their functions explained.
- ❑ 4. The unit(s) has(have) been operated in both the heating and cooling modes to demonstrate the soundness of normal operation. The contractor also agrees to check the outdoor loop for proper operation, i.e. system loop has been purged and pressurized per manufacturer's specifications.
- ❑ 5. Air temperatures in both heating and cooling have been demonstrated and fall within manufacturer's specifications.
- ❑ 6. All heating and cooling thermostat functions have been explained.
- ❑ 7. If auxiliary heat exists, the reason for auxiliary heat and when it is needed has been discussed.
- ❑ 8. Unit(s) run times at various temperatures have been discussed.
- ❑ 9. Filter maintenance has been explained and demonstrated.
- ❑ 10. All fault lights have been explained [thermostat and unit(s)] - when and how to reset unit in case of an emergency.
- ❑ 11. Ductwork is installed in a neat and professional manner.
- ❑ 12. Ductwork is isolated from the heat pump unit(s) by flexible connectors, and the supply and return plenum is internally insulated or constructed of fiberglass duct board.
- ❑ 13. Ductwork in unconditioned areas is sealed and insulated.
- ❑ 14. Airflow to each room is even and acceptable. (Unless conditions exist that are not correctable.)
- ❑ 15. All inside loop piping and piping from unit(s) to water heater is installed in a neat and professional manner and is fully insulated.
- ❑ 16. Rough grade and backfill has been completed.
- ❑ 17. The owner has been given a copy of the "As Built Site Plan" for the loop.
- ❑ 18. All structural and cosmetic repairs have been completed.
- ❑ 19. Anticipated operating costs have been estimated and discussed.
- ❑ 20. Warranty coverage (standard and optional extended warranties) has been explained & warranty information turned in to manufacturer.
- ❑ 21. All work areas have been left clean and tidy.

THE ABOVE ITEMS HAVE BEEN COMPLETED, REVIEWED, ARE UNDERSTOOD, AND AGREED TO. Note exceptions here:

_____

_____

_____

_____

Owner Signature: _____ Date: _____

Contractor Signature: _____ Date: _____

5. REBATE INFORMATION – AIR SOURCE HEAT PUMPS (please print)

Project Type: ❑ RETROFIT ❑ NEW CONSTRUCTION

EXISTING (OLD) SYSTEM (if applicable):

A	B	C
Size *(Tons)*	**Rated Efficiency** *(enter value, then check SEER or EER)**	**Quantity**
1.	❑ SEER ❑ EER	
2.	❑ SEER ❑ EER	
3.	❑ SEER ❑ EER	
4.	❑ SEER ❑ EER	
5.	❑ SEER ❑ EER	
6.	❑ SEER ❑ EER	

TABLE 3 – Air Source Heat Pump Systems – Qualifying Efficiencies and Rebate Schedule

Code	Qualifying Equipment	Minimum Efficiency	Rebate / Unit	Base Rebate ($ / Ton)	Efficiency Bonus Rebate ($ / Ton)
ASHP-1	Split Systems & Single Package, less than 65,000 BTU/hour	14.0 SEER	N/A	$25	$4
ASHP-2	Split Systems & Single Package, 65,000-134,999 BTU/hour	10.3 EER	N/A	$25	$4
ASHP-3	Split Systems & Single Package, 135,000-239,999 BTU/hour	9.7 EER	N/A	$20	$4
ASHP-4	Split Systems & Single Package, 240,000 BTU/hour and greater	9.5 EER	N/A	$20	$4
ASHP-5	Through-the-wall Split Systems (ductless), less than 30,000 BTU/hour	16.0 SEER	$200	N/A	N/A
ASHP-6	Through-the-wall Single Package (ductless), less than 30,000 BTU/hour	16.0 SEER	$200	N/A	N/A

***Efficiency Ratings by ARI (www.aridirectory.org):**
SEER = Seasonal Energy Efficiency Rating
EER = Energy Efficiency Rating

Efficiency Bonus Rebate provides an additional incentive for each 0.1 SEER or EER above the Minimum Efficiency.

Qualifying Air Source Heat Pump systems must have been tested in accordance with the ARI Test Standard test procedures and have nameplate data stamped with a qualifying SEER/EER. AIr Source Heat Pump systems must meet ARI 210/240 if under 135,000 BTU/hour and ARI 340/360 if above 135,000 BTU/hour. If equipment is larger than the ARI Standard certification process, it must be listed as a standard combination in manufacturer's literature. **A copy of the manufacturer's applicable unit rating must accompany this application.**

NEW SYSTEM:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Code *(Table 3)*	**Manufacturer Name**	**Model Number**	**Size** *(Tons)*	**Qty.**	**Annual Cooling Hours**	**ARI Reference Number***	**Minimum Efficiency** *(Table 3)*	**Rated Efficiency**** *(SEER or EER)*	**Equipment Cost**	**Base Rebate** *($/Ton) (Table 3)*	**Base Rebate** *(D x E X K)*	**Eligible Efficiency Bonus** *(I – H)*	**Efficiency Bonus Rebate** *($/Ton) (Table 3)*	**Efficiency Bonus Rebate** *(M x N) x (D x E) x 10*	**Total Rebate** *(L + O)*
1.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**
2.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**
3.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**
4.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**
5.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**
6.								❑SEER ❑EER	**$**	**$**	**$**		**$**	**$**	**$**

**** Please enter Rated Efficiency value and then check SEER or EER.**

TOTAL REBATE AMOUNT **$**

6. TERMS AND CONDITIONS

1. ELIGIBILITY
Rebates are available to non-residential electric customers of Austin Utilities, Owatonna Public Utilities, and Rochester Public Utilities (herein referred to as The Utility). All products must be in use in facilities in The Utility service territory.

2. APPLICATION
Program is offered January 1 through December 31 of the respective calendar year. **Due to limited funding, this rebate offer can be changed or withdrawn at any time without notice and is available on a first-come, first-serve basis.** The entire rebate application must be read and filled out completely or application will be returned.

3. INSPECTION AND VERIFICATION
The Utility reserves the right to inspect the customer's facility through on-site visits before and after new equipment installation to verify rebate eligibility.

4. INSTALLATION AND REBATE AMOUNTS
Qualifying energy-efficient equipment installed and operational within six (6) months of the date of purchase are eligible for rebate. Additional time may be granted subject to the Utility's pre-approval. In no case will the rebate paid by The Utility exceed the purchase price of the equipment. The maximum rebate amount is $25,000 per customer location per technology per year. The Utility can, at its sole discretion, increase rebate amounts.

5. INVOICE AND PAYMENT
Following inspection and verification (see #3) and completed installation, the customer must notify The Utility and submit original invoices specifying the quantity and price of all materials purchased, the date ordered, installation costs, and applicable taxes. After satisfactory review of the application and invoices, a rebate check or bill credit will be issued to the customer. Please allow 6-10 weeks from the date of application submission for delivery of rebate check or bill credit.

6. EQUIPMENT ELIGIBILITY REQUIREMENTS

Geothermal Heat Pump systems
Qualifying Geothermal Heat Pump systems must have been tested in accordance with the Air Conditioning and Refrigeration Institute's (ARI) Test Standard test procedures and have SEER/EER ratings clearly stamped on the nameplate. Eligible high-efficiency Geothermal Heat Pump systems must meet or exceed the Utility's minimum efficiency requirements as identified in Table 2 according to its respective characteristics. Eligible Geothermal Heat Pump systems must replace cooling equipment of lesser efficiencies and of equivalent or greater capacity (Tons or BTU's/hr) to qualify for a rebate.

Air Source Heat Pump systems
Qualifying Air Source Heat Pump systems must have been tested in accordance with the Air Conditioning and Refrigeration Institute's (ARI) Test Standard test procedures and have SEER/EER ratings clearly stamped on the nameplate. Eligible high-efficiency Air Source Heat Pump systems must meet or exceed the Utility's minimum efficiency requirements as identified in Table 3 according to its respective characteristics. Eligible Air Source Heat Pump systems must replace cooling equipment of lesser efficiencies and of equivalent or greater capacity (Tons or BTU's/hr) to qualify for a rebate.

7. TAX INFORMATION
The Utility will not be responsible for any tax liability imposed as a result of the rebate payment(s). Customers are advised to consult their tax advisors for details.

8. DISCLAIMER
The Utility does not guarantee that the implementation of energy-efficient measures or use of the equipment purchased or installed pursuant to this program will result in energy or cost savings. The Utility makes no warranties, expressed or implied, with respect to any equipment purchased or installed including, but not limited to, any warrant of merchantability or fitness for purpose. In no event shall The Utility be liable for any incidental or consequential damages. Customers are solely responsible for the proper disposal of existing equipment. Consult the Minnesota Pollution Control Agency (MPCA) office for details at (800) 657-3864.

9. ENDORSEMENT
The Utility does not endorse any particular vendor, manufacturer, product, or system in promoting this rebate program. Listing a vendor or product does not constitute an endorsement, nor does it imply that unlisted vendors or products are deficient or defective in any way.

10. PRIVACY
Information contained in this rebate application may be shared with the Minnesota Department of Commerce and our co-op partners.

RETURN COMPLETED APPLICATION AND REQUIRED DOCUMENTATION TO YOUR UTILITY PROVIDER:

Austin Utilities
400 - 4th Street NE
Austin, MN 55912
(507) 433–8886
(507) 433–5045 fax
www.austinutilities.com

Owatonna Public Utilities
P.O. Box 800
Owatonna, MN 55060
(507) 451–2480
(507) 451–4940 fax
www.owatonnautilities.com

Rochester Public Utilities
4000 East River Road NE
Rochester, MN 55906-2813
(507) 280–1500
(507) 280–1542 fax
www.rpu.org

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