

Rebate Application



2009 Energy Efficiency Program

<input type="checkbox"/>	Residential
<input type="checkbox"/>	Commercial
<input type="checkbox"/>	Non-Profit
<input type="checkbox"/>	Governmental

Customer Notice: In order for your rebate to be processed in a timely manner, you must attach a copy of the sales receipt showing date of purchase, dealer name and address, and quantity purchased.

Customer Name: _____ Service Address: _____
 Telephone: _____ Mailing Address: _____
 Email: _____
 Dealer/Contractor: _____ Date Purchased: _____
 Date Installed: _____

Qty	Device	Min. Rating	Brand	Serial Number	Per Unit Rebate	Rebate Total
<input type="checkbox"/>	Residential Central AC		<input type="text"/>	<input type="text"/>	\$300.00	<input type="text"/>
<input type="checkbox"/>	Window AC (1)		<input type="text"/>	<input type="text"/>	\$25.00	<input type="text"/>
<input type="checkbox"/>	Commercial Central AC		<input type="text"/>	<input type="text"/>	Per Ton Rebate \$100.00	Tons <input type="text"/> Rebate Total <input type="text"/>
<input type="checkbox"/>	Air-Source Heat Pump		<input type="text"/>	<input type="text"/>	\$300.00	<input type="text"/>
<input type="checkbox"/>	Geothermal Heat Pump		<input type="text"/>	<input type="text"/>	\$600.00	<input type="text"/>
<input type="checkbox"/>	Electric Heat (2)	≥ 1,000 w	_____→		Per kW Rebate \$25.00	kW <input type="text"/> Rebate Total <input type="text"/>
<input type="checkbox"/>	Programmable Thermostat (3)		_____→		Per Unit Rebate \$25.00	Rebate Total <input type="text"/>
<input type="checkbox"/>	Electric Water Heater	≥ EF 93	<input type="text"/>	<input type="text"/>	\$75.00	<input type="text"/>
<input type="checkbox"/>	Dishwasher		<input type="text"/>	<input type="text"/>	Per Unit Rebate \$25.00	Rebate Total <input type="text"/>
<input type="checkbox"/>	Refrigerator		<input type="text"/>	<input type="text"/>	\$25.00	<input type="text"/>
<input type="checkbox"/>	Clothes Washer		<input type="text"/>	<input type="text"/>	\$100.00	<input type="text"/>
<input type="checkbox"/>	CFL (Compact Fluorescent Lamp) (3)		_____→		Per Unit Rebate \$2.00	Rebate Total <input type="text"/>
<input type="checkbox"/>	Linear, circular, or U-Shaped fluorescent fixtures				Please attach detailed spreadsheet and write total rebate earned in box above <input type="text"/>	

- (1) Limit 3 window air conditioners per account
- (2) Permanently wired installation; only when installed with a heat pump
- (3) Rebate cannot exceed actual cost

Customer Signature _____ Date _____ Contractor Signature _____ Date _____

FOR OFFICE USE ONLY			
Date Verified & Initials	<input type="text"/>	Notes:	Donna/Curtis: Verification
Date Applied To Acct	<input type="text"/>		Kathy: Joural Entry
Customer Cost	<input type="text"/>		Billing: Apply to Account
Customer Rebate	<input type="text"/>		Donna: Final Check/File
Dealer Incentive	<input type="text"/>		

2009 SMU Energy Efficiency Rules and Regulations

The SMU Energy Efficiency Rebate Program provides financial incentives to encourage customers to purchase and install energy efficient appliances, motors, lights, HVAC systems and other devices and home improvements which use electricity and water wisely.

Section I

General Program Information

1. The effective date is January 1, 2009. Programs may be changed or cancelled by SMU without notice. Customers should check with the SMU office for information on programs.
2. The energy efficient device(s) shall be installed in the SMU service territory and cannot be relocated or sold for resale until retired from service.
3. SMU reserves the right to verify installation and invoices prior to rebate being paid.
4. SMU reserves the right to meter (at SMU expense) installed equipment to aid in determination of actual energy savings.
5. Rebates will not exceed equipment costs minus any manufacturers or dealer rebates.
6. To receive rebates for items for the 2009 program, the items must be purchased and/or installed during 2009. Following are the deadlines for turning in the rebates to SMU for payment:
 - a. Items purchased and installed before 12/1/09--Rebate filing due by 12/31/09
 - b. Items purchased and installed between 12/1/09 and 12/31/09--Rebate filing due by 1/31/10
7. Any dealers participating in the program must sign a letter of agreement stating their intent to follow the rules and regulations of this program.
8. Customers are responsible to insure that all equipment is installed in accordance with all codes, standards, and regulatory requirements.
9. Rebates will be approved on new devices only. No rebates will be approved for used items.
10. SMU does not guarantee reduced usage, demand, or cost savings. SMU makes no warranties, expressed or implied, with the respect to any equipment purchased or installed. In no event shall SMU be liable for any incidental or consequential damages. SMU does not endorse any manufacturer or product in this program.
11. Completed applications will be processed on a first come, first served basis, until available funds are committed.
12. Any income tax or other taxes which may be payable as a result of the rebate being paid (or applied to the utility account) are the responsibility of the customer.
13. The decision of Spencer Municipal Utilities regarding any disputes which arise in the rebate program is final.

Section II

Residential Rebates

1. Rebates will be issued to the party that paid for the energy efficient item(s). If that party also occupies the residence where the device was installed, the rebate will be paid as a credit to the utility account at that location. If that party does not occupy the residence where the device was installed, the rebate will be applied as a credit to another utility account in that party's name, or will be given in the form of a check. Payment will be made upon approval of completed application, sales ticket, and SMU verification.
2. Customers who receive the rebate will agree on the application to allow SMU to install and operate load control equipment including but not limited to A/C, heat pumps, or water heaters with the Board of Trustees of Spencer Municipal Utilities determines that use of load control is required on the SMU electric system.
3. Rebates are listed on the application form.

Section III

Commercial Rebates

- A. Electric Motor Rebates
 1. New and replacement 3-phase motors qualify. Rewinds are not eligible.
 2. Motors must be rated between 1 HP and 200 HP. NEMA design "B", AC Polyphase, and squirrel cage induction type with speeds of

1200, 1800, 3600 RPM. Motors over 200 HP will be allowed on a case-by-case basis.

3. Motors must be tested in accordance with IEEE test method B, and the motor nameplate stamped with its nominal efficiency.
 4. Minimum Qualifying Nominal Efficiency Rebates amount can be found in Table III.
 5. Rebates will be applied to the customer billing account upon completion and approval of the rebate application.
 6. Rebates are listed in Table III of the program. Please ask for a copy.
- B. Lighting
 1. Energy efficiency lighting rebates are available for both conversion and new construction for fluorescent, LED, metal halide, and high-pressure sodium, as well as motion sensors.
 2. All lighting improvements installed between January 1, 2009 and December 31, 2009 are eligible to apply during 2009.
 3. All bulbs and ballasts removed must be disposed of in accordance with any Federal, State, or local government regulations. SMU will provide free recycling to customers.
 4. Customer agrees to maintain lighting for which rebates were received at the same efficiency level or greater (i.e. customer cannot replace a burned out lamp with one of lower efficiency).
 5. SMU will not pay for the replacement of failed ballasts or burned out bulbs, regardless of whether the equipment was installed under this rebate program or not.
 6. Rebates will be applied to the customer billing account upon completion and approval of the rebate application.
 7. During the annual "Change A Light" promotion, only instant rebates under the program will be honored. The normal compact fluorescent lighting rebates will be suspended during that time.
 8. Rebates are listed on the commercial lighting rebate form.
 - C. Appliances
 1. Commercial accounts are also allowed to receive rebates for appliances that are listed in Table II of the residential program.
 2. Rules governing the appliance are the same as those listed in the residential program.
 3. If an energy efficient item is installed in a residence but paid for by someone other than the person who lives in the residence (landlord, property manager, builder or contractor, etc.), the rebate shall be classified as a commercial rebate.
 4. Rebates are listed on the rebate application.

Section IV

Non-Profit Organization Rebates

1. All rebates shall follow the same rules and regulations and item rebates as provided for in the commercial sector.

Section V

Local Government Agency Rebates

1. The following government agencies may apply for rebates under this section: City of Spencer, County of Clay, Spencer Municipal Hospital, and Spencer Community Schools.
2. All other government agencies may apply as non-profit or commercial.
3. All rebates shall follow the same rules and regulations and item rebates as provided for in the commercial section unless addressed in this section.
4. Rebates will be paid directly to the agency.
5. Rebates are not limited by minimums as required in the commercial program. Rebates are not subject to filing deadlines listed in Section I, item 6. Agency shall work with SMU staff to file the rebate on a timely basis upon acceptance of the project as complete.