

Tiered Incentive Program

Bonus Incentive Worksheet

National Grid offers a Tiered Incentive Program for Large Commercial and Industrial (C&I) customers in our Upstate New York (UNY) electric and gas service territories. By participating in this program, C&I customers can earn bonus incentives, money on top of traditional incentives, making projects even more financially attractive. We encourage our customers to include energy efficiency as part of their annual capital and project planning process. The more energy efficiency projects you do, the more you can save.

How it Works

Complete a defined number of energy efficiency projects over a two-year period and get a bonus incentive of 15%, 20% or 25% on top of the traditional C&I program incentives. Customers benefit by optimizing equipment or building performance, in addition to achieving significant energy benefits and additional financial incentives. The Tiered Incentive Program promotes comprehensive energy efficiency solutions by focusing on a long-term, more holistic view of energy usage.

Bonus Incentive Tiers

Tier I

- Complete 3 projects
- Receive a 15% bonus incentive

Tier II

- Complete 4 projects
- Receive a 20% bonus incentive

Tier III

- Complete 5 projects
- Receive a 25% bonus incentive

Program Details

- Bonuses for the program apply to projects installed at a single facility. The National Grid account number must be the same for all projects. For campus settings with one account serving multiple buildings, eligibility is determined on a per building basis. Projects that do not meet these criteria may not be eligible for a bonus incentive.
- National Grid will review the Bonus Incentive worksheet and issue an Acknowledgement Letter. Customers will have two years from the date construction begins on their first project to complete remaining projects and be eligible to receive the bonus incentive tier payment.
- All projects must follow the standard National Grid application, review, approval and processing requirements.
- Complete the attached National Grid Bonus Incentive worksheet.
- **All projects must be completed within the two-year period, and the bonus incentive payment will only be issued after all qualified projects have been completed and the standard incentive paid on each.**
- Please note the conditions below and limits on “other” qualifying types of projects. Gas, demand response (DR), electric vehicle charging (EV), POS Kitchen equipment can only be used as qualifying projects and will not be included in the bonus incentive calculation.
- The bonus incentive payment is calculated by multiplying the sum of each qualifying project's final standard incentive payment by the respective Bonus Tier percentage (15%, 20% or 25%) as defined on the enrollment form and will be issued as a separate incentive payment within 45 days of the last standard incentive paid.
- The value of the bonus incentive payment will be determined on a per project basis and will be calculated as the lesser of the standard project incentive multiplied by the Bonus Incentive Tier percentage or \$30,000 for each project.

Conditions of Enrollment

- A project that can be considered eligible* as part of a bonus incentive tier will only include new qualifying projects logged into the energy efficiency system (InDemand) with a committed date on or after January 1, 2019.
- If a customer is in National Grids electric but not gas service territory, projects completed through another utility or NYSERDA may qualify as an eligible project for the additional bonus incentive tiers. However no additional incentive will be paid on those projects.
- This program cannot be combined with other National Grid program offers or bonuses and is designed for use with UNY C&I Electric Program Retrofit measures.
- All electric projects must be completed through National Grid to be eligible for the Tiered Incentive Program and payment of a bonus incentive.
- Projects that have both electric and gas savings measures (dual-fuel) will only qualify as an electric project for eligibility and payment of a bonus incentive.
- Projects in the Small Business Services Program, Multifamily Program, and Direct Install Program are not eligible for the bonus incentives, or as a qualifying tier project.
- National Grid reserves all rights to determine eligible projects, measures and savings opportunities as detailed annually by the Tiered Incentive Program conditions.
- National Grid reserves the right to suspend this program at any time and standard terms and conditions apply.

*Eligibility is subject to change on an annual basis.

Enrollment Instructions



Customers must work with their National Grid representative to identify projects that will be completed during the term of the program.



Discuss the Bonus Incentive Worksheet with your National Grid Representative and submit for pre-approval.



Identify three, four or five projects in any of the Categories below. *(Note restrictions listed)*



This worksheet is considered an “enrollment application” and must be received prior to completion of the first project. Follow the standard C&I incentive application process for each project.



Receive bonus incentive in separate payment upon completion of all qualifying projects subject to Bonus Incentive cap of \$30,000 per project.

Bonus Incentive Worksheet



| Category A – Eligible Prescriptive Measures | Selected Projects | Estimated Incentive |
|--|--------------------------|---------------------|
| Prescriptive Lighting and/or Lighting Controls <ul style="list-style-type: none"> Only ONE lighting project (prescriptive or custom) is allowed per tiered incentive grouping All lighting equipment must meet program requirements | <input type="checkbox"/> | \$ 0.00 |
| Energy Management Systems (EMS) | <input type="checkbox"/> | \$ 0.00 |
| Hotel Occupancy Sensors <ul style="list-style-type: none"> Must control PTAC or stack units with AC and electric resistance heat, heat pumps or gas heat | <input type="checkbox"/> | \$ 0.00 |
| Compressed Air (must choose two from the list below) <ul style="list-style-type: none"> <input type="checkbox"/> High Efficiency Air Compressors (Load/No Load/Variable Speed/Variable Displacement) <input type="checkbox"/> Storage <input type="checkbox"/> Refrigerant Dryers <input type="checkbox"/> Zero Loss Condensate Drains <input type="checkbox"/> Engineered Air Nozzles | <input type="checkbox"/> | \$ 0.00 |
| Estimated Prescriptive Bonus Incentive Subtotal | | \$ 0.00 |
| Category B – Eligible Custom Express Measures <small>*Must meet eligibility requirements from custom express worksheet</small> | Selected Projects | Estimated Incentive |
| Variable Frequency Motors and Drives* <ul style="list-style-type: none"> Retrofits on Constant Speed Systems | <input type="checkbox"/> | \$ 0.00 |
| Refrigeration* <ul style="list-style-type: none"> <input type="checkbox"/> Refrigeration Infiltration Reduction (Strip Curtains and Night Covers) <input type="checkbox"/> Refrigeration Motors and Controls (ECMs) <input type="checkbox"/> Refrigerated Case Measures <input type="checkbox"/> Refrigerated Cases Anti-Sweat Heater Controls <input type="checkbox"/> Refrigeration Controls | <input type="checkbox"/> | \$ 0.00 |
| Estimated Custom Express Bonus Incentive Subtotal | | \$ 0.00 |
| Category C – Custom Measure Options ¹ <small>(Separate from Prescriptive and/or Custom Express measures above) Only ONE lighting project (prescriptive or custom) is allowed per tiered incentive grouping ¹The Tiered Bonus Incentive is capped at \$30,000 for each project.</small> | Selected Projects | Estimated Incentive |
| <ul style="list-style-type: none"> LED Lighting Systems | <input type="checkbox"/> | \$ 20.00 |
| <ul style="list-style-type: none"> Lighting Control Systems | <input type="checkbox"/> | \$ 30.00 |
| <ul style="list-style-type: none"> Compressed Air Systems | <input type="checkbox"/> | \$ 40.00 |
| <ul style="list-style-type: none"> Refrigeration | <input type="checkbox"/> | \$ 50.00 |
| <ul style="list-style-type: none"> Motor Driven Systems | <input type="checkbox"/> | \$ 1,010.00 |
| <ul style="list-style-type: none"> Process | <input type="checkbox"/> | \$ 500.00 |
| <ul style="list-style-type: none"> Other (specify) _____ | <input type="checkbox"/> | \$ 0.00 |
| Estimated Custom Bonus Incentive Subtotal | | \$ 1,650.00 |

Category D – Other Qualifying Projects

(These measures can count toward the total number of qualifying projects however they are not eligible for additional incentive in the Tiered Bonus Calculation)

| | | |
|---|---|--------------------------|
| <ul style="list-style-type: none"> Gas Measure – One gas measure eligible per tiered incentive grouping and project must be completed in same 2-year time frame of other tiered incentive projects. | | <input type="checkbox"/> |
| <ul style="list-style-type: none"> Demand Response – NEW enrollment in National Grid’s Demand Response (DR) program may also be considered as a qualifying project. | | <input type="checkbox"/> |
| <ul style="list-style-type: none"> Electric Vehicle Program – National Grid’s Electric Vehicle (EV) charging program may also be considered as a qualifying project. | | <input type="checkbox"/> |
| <ul style="list-style-type: none"> Point of Service Kitchen Equipment*(must choose 2 from the lists below) *Please contact the Program Implementer for eligible equipment: Energy Solutions, 617-440-5466 | | <input type="checkbox"/> |
| Gas <input type="checkbox"/> Gas Combination Oven <input type="checkbox"/> Gas Convection Oven <input type="checkbox"/> Gas Conveyor Oven <input type="checkbox"/> Gas Fryer <input type="checkbox"/> Gas Griddle <input type="checkbox"/> Gas Rack Oven <input type="checkbox"/> Gas Steamer | Electric <input type="checkbox"/> Electric Combination Oven <input type="checkbox"/> Electric Convection Oven <input type="checkbox"/> Electric Fryer <input type="checkbox"/> Electric Griddle <input type="checkbox"/> Electric Steamer <input type="checkbox"/> Electric Glass & Solid Door Freezer <input type="checkbox"/> Electric Glass & Solid Door Refrigerator <input type="checkbox"/> Electric Hot Food Holding Cabinet <input type="checkbox"/> Electric Ice Machine <input type="checkbox"/> Electric Low or High Temperature Dishwasher | |
| Total Other Qualifying Projects | | |

- ✓ Standard incentive amounts will be calculated and paid at the end of each completed project.
- ✓ Total eligible tiered bonus incentive will be calculated and paid after all qualifying projects are completed or at the end of the two-year period, whichever comes first.

Bonus Incentive Table

| Selected Projects | Application Number | Estimated Start Date | Estimated Completion Date | Standard Incentive Amounts |
|-------------------|--------------------|----------------------|--|----------------------------|
| Choose Measure | | | | 50.00 |
| Choose Measure | | | | 50.00 |
| Choose Measure | | | | 0.00 |
| Choose Measure | | | | 0.00 |
| Choose Measure | | | | 0.00 |
| | | | Subtotal | 100.00 |
| | | | Tiered Incentive Percent Applied* (15% 20% or 25%) | 15% |
| | | | Total Eligible Tiered Bonus Incentive Value | 15.00 |

Bonus Incentive Example:

Sample Bonus Incentive Calculation

| Selected Projects | Application Number | Estimated Start Date | Estimated Completion Date | Standard Incentive Amounts |
|---------------------------------|--------------------|----------------------|--|----------------------------|
| Advanced Lighting Systems | 123456 | 5/1/2018 | 12/1/2018 | \$15,296.00 |
| Energy Management Systems (EMS) | 234567 | 9/1/2018 | 6/15/2019 | \$800.00 |
| Eligible Gas Measure | 00001 | 6/1/2018 | 2/20/2019 | Qualifying Only |
| Choose an item. | | | | n/a |
| | | | Subtotal | \$16,096.00 |
| | | | Tiered Incentive Percent Applied* (15% 20% or 25%) | 15% |
| | | | Total Eligible Tiered Bonus Incentive Value | \$2,414.40 |

*Tiered incentive percent applied corresponds to number of projects completed; 3, 4 or 5

Bonus Incentive Worksheet



Application Information

Bonus Worksheet#

| CUSTOMER/ACCOUNT HOLDER INFORMATION (Customer must submit a W-9 Form) | | | | |
|--|---|---|---|--|
| Customer Facility Name | Contact Person | Application Date | | |
| Phone | Fax | Customer Federal Tax ID Number | | |
| Install Site | Email Address | Square Feet (Covered by this application) | | |
| Street Address | City | State | Zip | |
| Mailing Address (If different) | City | State | Zip | |
| Company Type <input type="checkbox"/> Incorporated <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Not Incorporated | Classification Type ≥2MW <input type="checkbox"/> (Large) <2MW <input type="checkbox"/> (Mid-size) <input type="checkbox"/> Industrial <input type="checkbox"/> Commercial *≥2MW Large Commercial use the <2MW Classification | | | |
| Customer of Record: Billing Account Number (Required) | <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> | | | |
| Building Type (Select one) | | | | |
| <input type="checkbox"/> Assembly | <input type="checkbox"/> Fast Food | <input type="checkbox"/> Hospital | <input type="checkbox"/> Multifamily High-rise | <input type="checkbox"/> Single Family Residence |
| <input type="checkbox"/> Auto Repair | <input type="checkbox"/> Food & Beverage | <input type="checkbox"/> Hotel | <input type="checkbox"/> Multifamily Low-rise | <input type="checkbox"/> Small Office |
| <input type="checkbox"/> Big Box | <input type="checkbox"/> Full Service Restaurant | <input type="checkbox"/> Large Office | <input type="checkbox"/> Refrigerated Warehouse | <input type="checkbox"/> Small Retail |
| <input type="checkbox"/> Community College | <input type="checkbox"/> Grocery | <input type="checkbox"/> Large Retail | <input type="checkbox"/> Pharmaceutical | <input type="checkbox"/> University |
| <input type="checkbox"/> College Dormitory | <input type="checkbox"/> Heavy Industrial | <input type="checkbox"/> Light Industrial | <input type="checkbox"/> Primary Metals | <input type="checkbox"/> Warehouse |
| <input type="checkbox"/> Elementary School | <input type="checkbox"/> High School | <input type="checkbox"/> Motel | <input type="checkbox"/> Religious | <input type="checkbox"/> Other _____ |

| INCENTIVE PAYMENT | | | | |
|--|---|-------|-----|--|
| <input type="checkbox"/> Customer Address Above <input type="checkbox"/> Installation Contractor / Equipment Vendor/ Project Expediter <input type="checkbox"/> Other (Fill out below) | | | | |
| Business Name | Contact Person | | | |
| Street Address | City | State | Zip | |
| Phone | Email Address | | | |
| Company Type | Federal Tax ID Number (Required if receiving incentive) | | | |

| INSTALLATION CONTRACTOR/PROJECT EXPEDITER INFORMATION | | | | |
|---|---|----------------|-----|--|
| Installation Company | Project Expediter | Contact Person | | |
| Street Address | City | State | Zip | |
| Phone | Email Address | | | |
| Company Type | Federal Tax ID Number (Required if receiving incentive) | | | |

| CUSTOMER ACCEPTANCE OF TERMS | | | | |
|---|--------------|-------|---------|------|
| <input type="checkbox"/> I certify that all statements made in this application are correct to the best of my knowledge and that I have read and agree to the terms and conditions of National Grid's Retrofit Program. | | | | |
| By (Authorized Signature) | Printed Name | Title | Company | Date |
| | | | | |