



# VARIABLE FREQUENCY DRIVE (VFD) RETROFIT INCENTIVE APPLICATION

OFFICE USE ONLY  
PROJECT ID:

**THIS INCENTIVE APPLICATION FORM IS VALID FROM JULY 1, 2009 TO DECEMBER 31, 2009. INCOMPLETE APPLICATIONS WILL BE RETURNED.**  
Focus incentives are subject to change. Please visit [focusonenergy.com/incentives/business](http://focusonenergy.com/incentives/business) to ensure you are using the most current form.

## SECTION 1: CUSTOMER LEGAL INFORMATION

Company Legal Name		FEIN (Federal Tax ID #) of customer (Must be 9 digits)	
Mailing Address		City	State
			ZIP Code
Business Classification of Customer (Check ONE): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____			

## SECTION 2: PAYMENT INFORMATION

Make Incentive Check Payable to (Check ONE and complete information below):  
 Company  Business Owner's Legal Name (Only if Sole Proprietor)  Market Provider (complete Section 4)

Attention to	Social Sec. # of Business Owner (only if Sole Proprietor AND no Federal Tax ID)
	_____

## SECTION 3: JOB SITE INFORMATION (where equipment was installed or service performed)

Job Site Name		Project Contact Name	
Job Site Street Address (physical location)		Project Contact Telephone	
City	State <b>WI</b>	ZIP Code	Project Contact Email
Electricity Provider at Job Site	Natural Gas Provider at Job Site	Installation/Service Date	

Type of business where equipment was installed or service performed (Check ONE):

Office  Food Processing  Educational Facility  Dairy & Livestock  Warehouse  
 Retail  Pulp & Paper  Government Facility  Horticulture & Crops  Health Care Facility (Inpatient)  
 Restaurant  Plastics  Place of Worship (no School)  Health Care Facility (Outpatient)  
 Grocery  Metal Casting  Place of Worship w/ School (Specify Grades: \_\_\_\_\_)  Multi-Family Building \_\_\_\_\_ # Bldgs, \_\_\_\_\_ Total # Units  
 Lodging  Other Manufacturing (Specify: \_\_\_\_\_)  Other (Specify: \_\_\_\_\_)

## SECTION 4: MARKET PROVIDER INFORMATION (equipment provider/installer or service provider) **Note:** In order to pay Market Provider, invoice must have "Focus on Energy" incentive clearly indicated and deducted from customer's amount due and Market Provider must provide Federal Tax ID # or Social Security # below.

Market Provider Name		FEIN or Social Security # of Market Provider (if receiving payment)	
Market Provider Street Address		City	State
			ZIP Code
Market Provider Contact Name	Contact Telephone	Contact Email	
Business Classification of Market Provider (Check ONE): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____			

## SECTION 5: CUSTOMER SIGNATURE

- Certification: The following certifications are required in order for this form to substitute for the IRS form W-9:**
- The number shown on this form is the correct taxpayer identification number.
  - I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends or (c) the IRS has notified me that I am no longer subject to backup withholding.
  - I am a U.S. citizen (includes a U.S. resident alien).

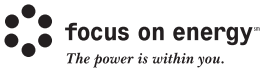
The undersigned agrees that the stated energy efficient measure(s) was (were) installed at the job site address listed above as part of the Focus on Energy Program. I have read and agree to the Terms & Conditions within this application. To the best of my knowledge, the statements made on this application are correct, and I have submitted the appropriate supporting documentation to receive an incentive.  **Itemized Invoice Attached**

Customer Signature	Customer Name (Print)	Date

**FORM SUBMITTAL: Return signed, completed form and ITEMIZED invoice within 30 calendar days of installation to:**

**Mail:** Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719.

**Email:** Applications and invoices can be scanned and emailed to [BPforms@weccusa.org](mailto:BPforms@weccusa.org).



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## QUALIFY YOUR EQUIPMENT / CALCULATE INCENTIVE

You may claim an incentive of **\$50 per horsepower up to a maximum of 30 percent of the total project cost** on new, installed variable frequency drives that meet the following requirements:

- Used in conjunction with pumping or air handling (i.e., fan or blower) application.
  - The pump or air handling system must operate a minimum of 2,000 hours annually.
  - The pump or air handling system may not exceed 500 horsepower.
  - Redundant or back-up units do not qualify. Routine replacement of existing VFDs do not qualify.
  - VFD speed must be automatically controlled by differential pressure, flow, temperature, or other variable signal.
  - The system controlled must have significant load diversity that will result in savings through motor speed variation.
- **For New Construction HVAC applications please use New Construction Incentive Application.**  
 ■ **You may claim an additional \$10 per horsepower if you submit one week of measured power (kW) readings for each pump, fan, or blower motor before and after the VFD is installed.**

Projects exceeding \$25,000 must receive written approval BEFORE installation. There is a maximum limit of \$500,000 per Corporate Tax ID per year for all Focus on Energy incentives (custom and prescriptive). If your project does not fit the descriptions above, you may be eligible for a custom incentive, which requires approval prior to project initiation and purchase of equipment. Direct inquires to 800.762.7077 then #2 for Business Programs.

Variable frequency drives may not be beneficial in pump systems where static head makes up a large portion of the total system head. It is also important that the load on the system vary over time to take advantage of the savings that a VFD can provide. Be sure to understand these aspects of your system and discuss them with the equipment vendor in advance of applying VFD technology.

## QUALIFY YOUR EQUIPMENT / CALCULATE INCENTIVE

Enter the information for **each** new variable frequency drive that you are claiming an incentive on in the table below. Attach additional applications for different installation addresses and if you are claiming incentives on more than two variable frequency drives.

VFD Application	Controls before VFD	Manufacturer & Model	Equipment Operating Hours (2,000 hr/yr min)	HP Controlled by VFD (500 hp max)	Quantity	SUBTOTAL Qty x HP x \$50)
<b>Check one:</b> <input type="checkbox"/> Chilled Water Distribution Pump <input type="checkbox"/> HVAC Heating Pump <input type="checkbox"/> Process Pump <input type="checkbox"/> Pool Pump <input type="checkbox"/> Boiler Draft Fan <input type="checkbox"/> Cooling Tower Fan <input type="checkbox"/> HVAC Fan <input type="checkbox"/> Process Fan <input type="checkbox"/> Other: _____	<b>Check one:</b> <input type="checkbox"/> Outlet Control Valve <input type="checkbox"/> Bypass Valve <input type="checkbox"/> Discharge Damper <input type="checkbox"/> Inlet Guide Vanes <input type="checkbox"/> Other: _____					
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Subtotal of Chart Above =

Total Project Cost = \$ \_\_\_\_\_ x 30% =

**SUBTOTAL INCENTIVE AMOUNT (Lesser of the above): \$**

**BONUS:** If one week of measured hourly power (kW) readings of the pump or fan motors before and after VFD installation is included with application, add additional \$10 per HP (\_\_\_\_\_ HP) X \$10 PER HP

Installation Date	<b>TOTAL INCENTIVE REQUESTED</b>	<b>\$</b>
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## INCENTIVE LIMIT

Purchase and install qualifying equipment and receive an energy efficiency incentive of up to \$25,000 per project. Incentives exceeding \$25,000 must receive written approval BEFORE project initiation or equipment purchase. There is a maximum limit of \$500,000 per Corporate Tax ID per year for all Focus on Energy incentives (prescriptive and custom).

## PRESCRIPTIVE INCENTIVES

Cash incentives are available for a variety of technologies. Check the Focus on Energy Web site at [focusonenergy.com/incentives/business](http://focusonenergy.com/incentives/business) or call 800.762.7077, then press #2 for more information. Depending on your business tax classification, the IRS may require you to pay taxes on incentives totalling over \$600 per calendar year.

## CUSTOM INCENTIVES

If your project does not fit the descriptions on this prescriptive incentive application form, it may qualify for a custom incentive which requires approval prior to project initiation and equipment purchase. Direct inquiries to 800.762.7077 then press #2 for Business Programs, or visit [focusonenergy.com](http://focusonenergy.com).

## TERMS & CONDITIONS

- Incentive Offer:** This application covers products purchased and installed/service performed between July 1, 2009 and December 31, 2009. Applications must be **submitted within 30 calendar days of project installation** and no later than December 31, 2009. Please keep a copy for your records. Incomplete applications will be returned.
- Proof of Purchase:** This application must have complete information and be submitted with an invoice itemizing the **new equipment** purchased. The invoice must indicate date of purchase, the size, type, make, model, serial number, part number and/or equipment manufacturer (OEM) specification sheets. The signed application and invoices must be sent to Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719.
- Compliance:**
  - All projects are expected to comply with federal, state and local codes.
  - All equipment must be new (with the exception of surveys, audits and service buydowns). Used or rebuilt equipment is not eligible for incentives. Existing equipment must be removed.
  - Equipment must meet specification requirements and be purchased and operating prior to submitting an incentive application form.
  - Only one incentive will be granted for each project. Incentives granted to contractors, distributors or other market providers cannot also be claimed by end-use customers.
- Payment:** Once completed paperwork is submitted, incentive payments are made within 6–8 weeks. Incomplete applications will be returned.
- Inspection:** Program staff may conduct an inspection of the facility to survey the installed projects.
- Publicity:** Focus on Energy reserves the right to publicize your participation in this program, unless you specifically request otherwise.
- Program Discretion:** Incentives are available on a first-come, first-served basis. This offer is subject to change or termination without notice at the discretion of the Focus on Energy Program.
- Focus Logo:** Customers or market providers may not use the Focus on Energy name or logo in any marketing, advertising or promotional materials without prior written permission.
- Disclaimers:** Focus on Energy
  - Does not endorse any particular market provider, manufacturer, product, labor or system design by offering this program;
  - Will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
  - Does not expressly or implicitly warrant the performance of installed equipment or contractor's quality of work (contact your contractor for detailed warranties);
  - Is not responsible for the proper disposal/recycling of any waste generated as a result of this project; and
  - 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.
- Verification:** Any customer receiving an incentive check may be contacted by an evaluator to verify service/equipment installation or be asked to complete a customer survey.

## UTILITY ELIGIBILITY

Incentives for specific technologies are offered by Focus on Energy to business customers including commercial, industrial, state, federal and local governments, agricultural, and schools/institutions with locations in Wisconsin. Customers of a participating electric provider are eligible for electric technology incentives only. Customers of natural gas providers are eligible for gas savings technology incentives only. Customers who have both a participating electric provider and a participating natural gas provider could qualify for all incentives. To determine eligibility, visit the Focus on Energy Web site at [focusonenergy.com/utilities](http://focusonenergy.com/utilities).

Focus on Energy works with eligible Wisconsin residents and businesses to install cost effective energy efficiency and renewable energy projects. Focus information, resources and financial incentives help to implement projects that otherwise would not get completed, or to complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, promote in-state economic development, protect our environment and control the state's growing demand for electricity and natural gas.

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