

Energy Management Systems



Apply online at www.MassSaveApplicationPortal.com



Electric Program Administrators



Cape Light Compact Tel: 1-800-797-6699 www.capelightcompact.org efficiency@capelightcompact.org

EVERSURCE

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efficiencywmass@eversource.com

nationalgrid

National Grid Tel: 1-800-787-1706 www.nationalgridus.com efficiency@nationalgrid.com



Unitil Tel: 1-888-301-7700 www.unitil.com efficiency@unitil.com

Gas Program Administrators



Berkshire Gas www.berkshiregas.com efficiency@berkshiregas.com



A NiSource Company Columbia Gas of Massachusetts

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Eversource Energy Tel: 1-844-887-1400 www.eversource.com efficiencyma@eversource.com



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Unitil Tel: 1-888-301-7700 www.unitil.com efficiency@unitil.com



The Retrofit Program is designed for commercial and industrial customers to help replace aging, inefficient equipment and systems with energy efficient technologies. The Retrofit Program provides a customer with incentives and technical services that will facilitate the installation of premium efficient equipment. Call your Program Administrator ("PA") to arrange a convenient time to perform an inspection of the existing equipment or systems.

Application Instructions

For Replacement of Operating Equipment

1. Is your project eligible?

• Equipment shall be new and shall be installed in a commercial, industrial, institutional, educational, or municipal building within an electric Program Administrator's (PA's) service territory

2. Is the equipment you intend to buy eligible?

• Product types listed in this form are eligible for prescriptive incentives. However, other measures not listed here may be eligible for custom incentives using the Custom Retrofit Application

3. Pre-Approval requirements:

- Contact your Program Administrator before purchasing and installing the equipment
- To see if the energy efficient measure (EEM) qualifies for an incentive:
 - i. Review the Terms and Conditions governing the program, then submit a completed application form with an authorized signature
 - ii. Submit a copy of the Manufacturer's technical specification sheets ("cut sheets") for each type of eligible equipment to be purchased
 - iii. Once pre-approved, a "pre-approved incentive letter" will be issued

4. Installation and incentive requirements:

- · Once pre-approved, purchase and install the qualifying equipment within twelve (12) months of PA's pre-approval
- Return the required information to your Program Administrator within 30 days of the installation:
 - i. A copy of the completed and signed pre-approval application
 - ii. If there is a change in equipment, please submit a new manufacturer's technical specification sheets ("cut sheets") for each type of eligible equipment purchased
 - iii. A copy of your invoice indicating Proof of Purchase must indicate type, size, make, and model number of the equipment and date of purchase and installation
 - iv. At the post-installation verification, the customer is required to sign the post-installation customer acknowledgement section of the original application

Program details:

This incentive program covers applications created on or after January 1, 2019. Details, including incentive levels, are subject to change without prior notice. Contact your Program Administrator for the latest program details.

Once completed, send this Application Form to the Program Administrator serving the specific customer account where the selected efficiency measure(s) will be installed. Contact information for all Program Administrators can be found on Page 1 of this Application.

Alternatively, Applications can be created and submitted online using the Mass Save Application Portal (www.MassSaveApplicationPortal.com). The Portal makes it possible to create and submit a single Application regardless of the number of measures, the number of end uses involved, and the types of projects or programs they span.

NOTE: If you are interested in financing your project, please contact your energy efficiency Program Administrator to discuss terms and eligibility prior to purchasing your qualifying equipment. Further information can also be found on **www.masssave.com/en/learn/business/the-mass-save-financing-for-business-program/**.

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□ Berksnire Gas	s	ipact U Coi	umbia Gas 🗀 Everso	ource Libe	erty Utilities 🗌	National Grid Unitil			
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			DUONE.						
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GAS COMPANY NAME					AS ACCOUNT NUMBER	R			
BUILDING TYPE (PLEAS	SE PLACE "X" IN APPROPRIAT	E BALLOT BOX)							
ASSEMBLY	FAST FOOD	_	HOTEL	MULTI STORY	_	ELIGIOUS SMALL RETAIL			
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Energy Management System (EMS) Eligibility Requirements and Incentive Details

EMS Requirements:

- 1. To qualify for an incentive, the building's new energy management system (EMS) must incorporate all EMS strategies listed if they are appropriate to the facility and equipment. Only EMS points associated with control of non-lighting electric end uses and gas end uses are eligible for incentives (i.e., fuel controls, lighting controls and alarm points are not eligible).
- 2. Only the installation of a new EMS or expansion of an existing system to control additional equipment is eligible for incentives. EMS must be installed in an existing building on existing equipment. The replacement of an existing EMS or existing control points or a software upgrade is not eligible for incentives. The installation of EMS on new equipment is not eligible for incentives.
- 3. An EMS shall include a central operator's station including a central processing unit, PC (local or remote), monitor and printer. The operator's station shall be capable of monitoring all sensors and field devices in real time. Communications shall be via modem, communications bus, wireless device or internet connection to other microprocessor-based field services.

Table 1A: EMS Incentives

Measure Descrip	otion	Maximum Unit Incentive for Eligible Points	Maximum Nur	nber of Points	Minimum Efficiency Incentive Criteria			
Energy Managem	nent Systems Cond	ditioned space conti	rolled (See Req. 1,2,3					
5,000 – 20,000 Sq.	Feet		(up to 20	points)	Facility must have electric AC			
Total Car Foot			16 Electric	4 Gas	and/or electric/gas heat. EMS to			
Total Sq. Feet			Total # of Points		include, if applicable:			
20,001 - 80,000 Sq	20,001 - 80,000 Sq. Feet		(up to 60 points)		Optimal Start/Stop			
Total Car Foot	Total Sq. Feet		48 Electric	12 Gas	2. 7-day scheduling			
iotai 5q. reet			Total # of Points		3. Economizer or enthalpy control			
80,001 Sq. Ft. to <	80,001 Sq. Ft. to < 300,000* Sq. Ft.		(up to 160 points)		Direct digital temperature control for air handling unit			
Total Car Foot			128 Electric	32 Gas				
Total Sq. Feet			Total # of Points					
* = or > 300,000 S	q. Ft. Go Custom							

Table 1B: Documentation Required to Complete EMS Form

Seq.	Description	Completed
1	Complete Table 1D: "EMS — Equipment Inventory List," Survey of Controlled Equipment" (page 4)	Yes
2	Attached points list for all controls being installed. Include point type and description	Yes
3	Attach complete sequence of operations	Yes
4	Complete Table 1E: "Energy Management Summary" (page 5)	Yes
5	Attach manufacturers' performance for all controlled equipment including model numbers and efficiency levels	Yes
6	Complete Table 1A: EMS Incentives including the total square feet controlled and the total number of control points.	Yes

Table 1C: EMS — Equipment Specification (Facility Detail)

Building Type and Description	Building Conditioned Space Controlled (Sq. Ft.)	Building Control System Description	Annual Energy Use		Estimated Energy Savings	
			kWh	Fossil Fuel	kWh	Fossil Fuel

Table 1D: EMS — Equipment Inventory List — Survey of Controlled Equipment

Equipment ID	Location	Area Served	HP/kW/Tons/etc	Current Operating Schedule	Future Operating Schedules	Control Strategy

Table 1E: Energy Management Summary

	Connected kW	No. of	Schedule Operating Hours				Control Strategies (indicate with an "X" where applicable)								
Equipment Controlled		Input/ Output	Before EMS		After EMS										
	*MBH for gas	Points	Hrs/Wk	Wks/Yr	Hrs/Wk	Wks/Yr		Optimal Start/Stop	Night Setback	DDC Temp. Control	CHW Reset	Enthalpy Economizer	Static Reset	OA HW Reset	DCV
Cooling Equipment — Variable Load Factors															
Chillers															
Pumps – w/VSDs (CHW or CW)															
Condenser Fans															
Cooling Tower Fans															
DX Compressors															
Heating Equipment — Variable Load Factors															
HW Pumps (VSD)															
Electric Boiler															
Gas Boiler/Gas Furnace* (MBH)															
Baseboard Heating															
Electric Heat															
Year Round Equipment — Variable Load Factors															
Heat Pumps															
Fans – VAV															
Electric Reheat															
Constant Load Factors															
Circ. Pumps – CHW & CW															
Circ. Pumps – HW															
Heat Recovery Pumps															
Fans – Supply															
Fans – Exhaust															
Other Type of Loads															
Lighting															
Other															

Hotel Occupancy Sensors Eligibility Requirements and Incentive Details

Eligibility Requirements for Hotel Sensors:

- 1. Sensors must control PTAC, heat pump units or fan coil units
- 2. PTAC's must have electric heat to be eligible
- 3. The control must include:
 - (a) occupancy detectors
 - (b) window/door switches for rooms that have operable windows or patio doors
 - (c) set back to 65°F in the heating mode and set forward to 78°F in the cooling mode when unoccupied detector is in unoccupied mode
- 4. Sensors controlled only by a front desk system are not eligible
- 5. Replacement or upgrade of occupancy based HVAC controls are not eligible
- 6. Hotels must operate 12 months of the year
- 7. Total quantity of eligible sensors cannot exceed the total quantity of room HVAC units controlled

Table 2A: Hotel Occupancy Sensors Incentives

Quantity of Sensors	Unit Incentive Total Incentive		Heat Source Cooling Provided by	Equipment Capacity BTUH or Tons
	\$75/Sensor		☐ Heat Pump☐ PTAC with Electric Heat	
	\$75/Sensor		☐ Heat Pump ☐ PTAC with Electric Heat	

Terms and Conditions

1. Incentives

Subject to these Terms & Conditions, the PA will pay Incentives to Customer for the installation of EEMs.

2. Definitions

- (a) "Approval Letter" means the letter issued by PA stating PA's approval of Customer's application, the maximum approved Incentives, required date of EEM completion, any changes to Customer's application and any other requirements of the PA related to the Incentives.
- (b) "Customer" means the commercial and industrial ("C&I") customer maintaining an active account for service with either a gas or electric distribution company.
- (c) "EEMs" are those energy efficiency measures described in the Program Materials or other Custom Measures that may be approved by the PA.
- (d) "Facility" means the Customer location in Massachusetts served by the PA where EEMs are to be installed.
- (e) "Incentives" means those payments made by the PA to Customer pursuant to the Program and these Terms and Conditions. Incentives may also be referred to as "Rebates".
- (f) "Minimum Requirements Document" means the minimum requirements document that may be required by the PA, which, if so required, will be submitted with Customer's application and approved by PA.
- (g) "Program" means any of the energy efficiency programs offered to a C&I Customer by PA.
- (h) "PA" or "Program Administrator" means The Berkshire Gas Company, or Cape Light Compact JPE, or Columbia Gas of Massachusetts, or Eversource Energy, or Liberty Utilities, or National Grid, or Unitil, as applicable.
- (i) "Program Materials" means the documents and information provided or made available by the PA specifying the qualifying EEMs, technology requirements, costs and other Program requirements.

3. Application Process and Requirement for PA Approval

- (a) The Customer shall submit a completed application to the PA. The Customer may be required to provide the PA with additional information upon request by the PA. Customer will, upon request by the PA, provide a copy of the as-built drawings and equipment submittals for the Facility after EEMs are installed. To the extent required by the PA or by applicable law, regulation or code, this analysis shall be prepared by a Professional Engineer licensed in the state where the Facility is located.
- (b) To be eligible for gas funded EEM's Customer must have an active natural gas account. To be eligible for electric funded EEM's a Customer must have an active electric account. Customers must meet any additional eligibility requirements set forth in the Program Materials.
- (c) The PA reserves the right to reject or modify Customer's application. The PA may also require the Customer to execute additional agreements, or provide other documentation prior to PA approval. If PA approves Customer's application, PA will provide Customer with the Approval Letter.
- (d) The PA reserves the right to approve or disapprove of any application or proposed EEMs.
- (e) Sections 3(a)-(c) do not apply in the event that the Program Materials explicitly state that no Approval Letter is required for the Program. In such an event, Customer must submit to PA the following: (i) completed and signed Program rebate form, (ii) original date receipts for purchase and installation of EEMs, and (iii) any other required information or documentation within such time as Program Materials indicate.

4. Pre- and Post-Installation Verification; Monitoring and Inspection

- (a) Customer shall cooperate and provide access to Facility and EEM for PA's pre-installation and post-installation verifications. Such verifications must be completed to PA's satisfaction.
- (b) Customer agrees that PA may perform monitoring and inspection of the EEMs for a three year period following completion of the installation in order to determine the actual demand reduction and energy savings.

5. Installation Schedule Requirements

If the Customer does not complete installation of the approved EEMs within the earlier of the completion date specified in the Approval Letter or twelve (12) months from the date the PA issues written pre-approval of the EEM project, the PA may terminate any obligation to make Incentive payments.

6. Incentive Amounts, Requirements for Incentives and Incentive Payment Conditions

- (a) The PA reserves the right to adjust and/or negotiate the Incentive amount. PA will pay no more than the cost to Customer of purchasing and installing the EEM, the calculated incremental cost, the prescriptive rebate on the form, or the amount in the Approval Letter (unless such Approval Letter is not required), whichever is less.
- (b) PA shall not be obligated to pay the Incentive amount until all the following conditions are met: (1) PA approves Customer's application and provides the Approval Letter (unless an Approval Letter is not required by the terms of the Rebate), (2) satisfactory completion of pre-installation and post-installation verifications by PA, (3) purchase and installation of EEMs in accordance with Approval Letter, Program Materials, Minimum Requirements Document, Customer's application and these Terms and Conditions, (4) all applicable permits, licenses and inspections have been obtained by Customer, (5) PA's receipt of final drawings, operation and maintenance manuals, operator training, permit documents, and other reasonable documentation, and (6) PA's receipt of all invoices for the purchase and installation of the EEMs.
- (c) All EEM invoices will include, at the minimum, the model, quantity, labor, materials, and cost of each EEM and/or service, and will identify any applicable discounts or other incentives.
- (d) PA reserves the right, in its sole discretion, to modify, withhold or eliminate the Incentive if the conditions set forth in Section 6(b) are not met.
- (e) Upon PA's written request, Customer will be required to refund any Incentives paid in the event that Customer does not comply with these Terms and Conditions and Program requirements.
- (f) PA shall use commercially reasonable efforts to pay the Incentive amount within forty-five (45) days after the date all conditions in Section 6(b) are met.

7. Contractor Shared Savings Arrangements

If EEMs are being installed by a contractor under a shared savings arrangement, in which the contractor's compensation is based on the savings achieved, the PA maintains the right to determine the cost of purchasing and installing the EEMs.

8. Maintenance of EEMs

Customer shall properly operate and maintain the EEMs in accordance with the manufacturer's recommendations and the terms thereof for the life of the equipment.

9. Program/Terms and Conditions Changes

Program terms and materials (including these Terms & Conditions) may be changed by the PA at any time without notice. The PA reserves the right, for any reason, to withhold approval of projects and any EEMs, and to cancel or alter the Program, at any time without notice. Approved applications will be processed under the Terms and Conditions and Program Materials in effect at the time of the Approval Letter.

10. Publicity of Customer Participation

The Customer grants to the PA the absolute and irrevocable right to use and disclose for promotional and regulatory purposes (a) any information relating to the Customer's participation in the Program, including, without limitation, Customer's name, project energy savings, EEMs installed, and incentive amounts, and (b) any photographs taken of Customer, EEMs, or Facility in connection with the Program, in any medium now here or hereafter known.

Terms and Conditions (continued)

11. Indemnification and Limitation of the PA's Liability

To the fullest extent allowed by law, Customer shall indemnify, defend and hold harmless PA, its affiliates and their respective contractors, officers, directors, members, employees, agents, representatives from and against any and all claims, damages, losses and expenses, including reasonable attorneys' fees and costs incurred to enforce this indemnity, arising out of, resulting from, or related to the Program or the performance of any services or other work in connection with the Program, caused or alleged to be caused in whole or in part by any actual or alleged act or omission of the Customer, or any contractor, subcontractor, agent, or third party hired by or directly or indirectly under the control of the Customer, including any party directly or indirectly employed by or under the control of any such contractor, subcontractor, agent, or third party or any other party for whose acts any of them may be liable.

To the fullest extent allowed by law, the PA's aggregate liability, regardless of the number or size of the claims, shall be limited to paying approved Incentives in accordance with these Terms and Conditions and the Program Materials, and the PA and its affiliates and their respective contractors, officers, directors, members, employees, agents, representatives shall not be liable to the Customer or any third party for any other obligation. To the fullest extent allowed by law and as part of the consideration for participation in the Program, the Customer waives and releases the PA and its affiliates from all obligations (other than payment of an Incentive), and for any liability or claim associated with the EEMs, the performance of the EEMs, the Program, or these Terms and Conditions.

12. No Warranties or Representations by the PA

- (a) THE PA DOES NOT ENDORSE, GUARANTEE, OR WARRANT ANY CONTRACTOR, MANUFACTURER OR PRODUCT, AND THE PA MAKES NO WARRANTIES OR GUARANTEES IN CONNECTION WITH ANY PROJECT, OR ANY SERVICES PERFORMED IN CONNECTION HEREWITH OR THEREWITH, WHETHER STATUTORY, ORAL, WRITTEN, EXPRESS, OR IMPLIED, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THIS DISCLAIMER SHALL SURVIVE ANY CANCELLATION, COMPLETION, TERMINATION OR EXPIRATION OF THE CUSTOMER'S PARTICIPATION IN THE PROGRAM. CUSTOMER ACKNOWLEDGES AND AGREES THAT ANY WARRANTIES PROVIDED BY ORIGINAL MANUFACTURERS', LICENSORS', OR PROVIDERS' OF MATERIAL, EQUIPMENT, OR OTHER ITEMS PROVIDED OR USED IN CONNECTION WITH THE PROGRAM UNDER THESE TERMS AND CONDITIONS, INCLUDING ITEMS INCORPORATED IN THE PROGRAM, ("THIRD PARTY WARRANTIES") ARE NOT TO BE CONSIDERED WARRANTIES OF THE PA AND THE PA MAKES NO REPRESENTATIONS, GUARANTEES, OR WARRANTIES AS TO THE APPLICABILITY OR ENFORCEABILITY OF ANY SUCH THIRD PARTY WARRANTIES. THE TERMS OF THIS SECTION SHALL GOVERN OVER ANY CONTRARY VERBAL STATEMENTS OR LANGUAGE APPEARING IN ANY PA'S OTHER DOCUMENTS.
- (b) Review of the design and installation of EEMs by PA is limited solely to determine whether Program requirements have been met and shall not constitute an assumption by PA of liability with respect to the EEMs. Neither the PA nor any of its employees or contractors is responsible for determining that the design, engineering or installation of the EEMs is proper or complies with any particular laws, codes, or industry standards. The PA does not make any representations of any kind regarding the benefits or energy savings to be achieved by the EEMs or the adequacy or safety of the EEMs.
- (c) PA is not a manufacturer of, or regularly engaged in the sale or distribution of, or an expert with regard to, any equipment or work.
- (d) No activity by the PA includes any kind of safety, code or other compliance review.

13. Customer Responsibilities

Customer is responsible for all aspects of the EEMs and related work including without limitation, (a) selecting and purchasing the EEMs, (b) selecting and contracting with the contractor(s), (c) ensuring contractor(s) are properly qualified, licensed and insured, (d) ensuring EEMs and installation of EEMs meet industry standards, Program requirements and applicable laws, regulations and codes, and (e) obtaining required permits and inspections. PA reserves the right to (a) deny a vendor or contractor providing equipment or services, and (b) exclude certain equipment from the Program.

14. Removal of Equipment

The Customer shall properly remove and dispose of or recycle the equipment, lamps and components in accordance with all applicable laws, and regulations and codes. Customer will not re-install any of removed equipment in the Commonwealth of Massachusetts or the service territory of any affiliate of the PA, and assumes all risk and liability associated with the reuse and disposal thereof.

15. Energy Benefits

Other than the (i) the energy cost savings realized by Customer, (ii) energy or ancillary service market revenue achieved through market sensitive dispatch, (iii) alternative energy credits, and (iv) renewable energy credits, the PA has the unilateral rights to apply for any credits or payments resulting from the Program or EEMs. Such credits and payments include but are not limited to: (a) ISO-NE capacity, (b) forward capacity credits, (c) other electric or natural gas capacity and avoided cost payments or credits, (d) demand response program payments. Except for the credits and payments set forth in (i)-(iv) of this Section, Customer agrees not to, directly or indirectly, file payments or credits associated with the Program or EEMs, and further will not consent to any other third party's right to such payments or credits without prior written consent from the PA. PA's rights under this Section are irrevocable for the life of the EEMs unless the PA provides prior written consent.

16. Customer Must Declare and Pay All Taxes

The benefits conferred upon the Customer through participation in this Program may be taxable by the federal, state, and local government. The Customer is responsible for declaring and paying all such taxes. The PA is not responsible for the payment of any such taxes.

17. Counterpart Execution; Scanned Copy.

Any and all Program related agreements and documents may be executed in several counterparts. A scanned or electronically reproduced copy or image of such agreements and documents bearing the signatures of the parties shall be deemed an original.

18. Miscellaneous

- (a) Paragraph headings are for the convenience of the parties only and are not to be construed as part of these Terms and Conditions.
- (b) If any provision of these Terms and Conditions is deemed invalid by any court or administrative body having jurisdiction, such ruling shall not invalidate any other provision, and the remaining provisions shall remain in full force and effect in accordance with their terms.
- (c) These Terms and Conditions shall be interpreted and enforced according to the laws of the Commonwealth of Massachusetts. Any claim or action arising under or related to the Program or arising between the parties shall be brought and heard only in a court of competent jurisdiction located in the Commonwealth of Massachusetts.
- (d) In the event of any conflict or inconsistency between these Terms and Conditions and any Program Materials, these Terms and Conditions shall be controlling.
- (e) Except as expressly provided herein, there shall be no modification or amendment to these Terms and Conditions or the Program Materials unless such modification or amendment is in writing and signed by a duly authorized officer of the PA.
- (f) Sections 4(b), 10, 11, 12, 14, 15 & 18 shall survive the termination or expiration of the Customer's participation in the Program.