

# CONSERVE & \$SAVE®

## COMMERCIAL GROUND SOURCE HEAT PUMPS REBATE APPLICATION

### SECTION A. CUSTOMER INFORMATION (please print)

Account Name \_\_\_\_\_ Doing Business As (if different from Account Name) \_\_\_\_\_

Installation Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Mailing Address (if different from above) (rebate check will be mailed here) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Account Number \_\_\_\_\_

**Send us a rebate check. Apply rebate to our account.**  
(Rebates \$75 and under will be applied to your account. If a box is not checked a bill credit will automatically be issued.)

**Type of Business:** Church      Government      Grocery      Health      Industrial      Lodging  
Multi-family      Office      Restaurant      Retail      School      Other \_\_\_\_\_

**How did you hear about CONSERVE & SAVE\*?** Billboard      Chamber of Commerce      Contractor      Newspaper      Radio  
Retailer/Vendor      Social Media      TV      Utility Newsletter      Utility Representative      Utility Web Site      Other \_\_\_\_\_

### SECTION B. 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 (rebate check will be mailed to contact) \_\_\_\_\_ Daytime Phone Number \_\_\_\_\_

Email \_\_\_\_\_

By typing my first and last names in the box below, I am signing this document and 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® programs.

### SECTION C. CONTRACTOR/VENDOR INFORMATION (please print)

Company Name \_\_\_\_\_ Contact Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Daytime Phone Number \_\_\_\_\_ Email \_\_\_\_\_

#### TEAMING UP TO SAVE YOU MONEY



#### OFFICE USE ONLY

Date Received: \_\_\_\_\_

Inspected (Date & Initials): Pre: \_\_\_\_\_ Post: \_\_\_\_\_

Approval: \_\_\_\_\_

Date: \_\_\_\_\_

A/N: \_\_\_\_\_

**TOTAL REBATE:**  
\$ \_\_\_\_\_

## SECTION D. REBATE INFORMATION – GROUND SOURCE HEAT PUMPS

**Project Type:**      **RETROFIT**              **NEW CONSTRUCTION**

### EXISTING (OLD) SYSTEM (if applicable):

COOLING			HEATING		
Code <i>(Table 1)</i>	Size of Unit <i>(Tons)</i>	Rated Efficiency <i>(enter value, then check SEER* or EER*)</i>	Equipment Type <i>(Furnace, Boiler, etc.)</i>	Rated Input <i>(BTU's)</i>	Rated Efficiency <i>(enter value, then check HSPF* or AFUE*)</i>
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	Rooftop/Packages AC: Less than or equal to 65,000 BTU/hour (5.4 Tons)
UT-2	Rooftop/Packages AC: 65,001 – 134,999 BTU/hour (5.4 – 11.2 Tons)
UT-3	Rooftop/Packages AC: 135,000 – 239,999 BTU/hour (11.2 – 20 Tons)
UT-4	Rooftop/Packages AC: 240,000 – 759,999 BTU/hour (20 – 63.3 Tons)
UT-4	Rooftop/Packages AC: 760,000 BTU/hour and greater (63.3+ Tons)
PTAC	Packaged Terminal Units (all sizes)
PTHP	Packaged Terminal Heat Pump Units (all sizes)

**\*Efficiency Ratings by AHRI ([www.ahridirectory.org](http://www.ahridirectory.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      Other \_\_\_\_\_

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: \_\_\_\_\_

GROUND SOURCE HEAT PUMPS:														
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Code <i>(Table 2)</i>	Manufacturer Name	Model Number	Size <i>(Tons)</i>	Qty.	Annual Cooling Hours <i>(Table 3)</i>	Annual Heating Hours <i>(Table 3)</i>	AHRI Reference Number*	Minimum EER <i>(Table 2)</i>	Rated EER	Rated COP	Rated HSPF	Base Rebate <i>(D x E x \$200)</i>	EER Bonus Rebate** <i>(J - I) x (D x E x \$20)</i>	Total Rebate^ <i>(M + N)</i>
1.														
2.														
3.														
4.														
5.														
<b>DESUPERHEATER REBATE: Qty: _____ X \$250</b>														

**TOTAL REBATE AMOUNT**

\* **Qualifying Water-to-Air Ground Source Heat Pump** efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at [www.ahridirectory.org](http://www.ahridirectory.org). EER rating is at AHRI/ISO 13256-1 cooling conditions of 77°F entering water temperature and 80.6°F dry bulb/66.2°F wet bulb entering air temperature (ground loop heat pump). A copy of the manufacturer's applicable unit rating must accompany this application.

**Qualifying Water-to-Water Ground Source Heat Pump** efficiency ratings are determined using the Air-Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at [www.ahridirectory.org](http://www.ahridirectory.org). EER rating is at ISO 13256-2 cooling conditions of 77°F entering water temp. and 53.6°F leaving water temperature (ground loop heat pump). A copy of the manufacturer's applicable unit rating must accompany this application.

**Qualifying Direct Exchange Ground Source Heat Pumps** must be rated in accordance with the AHRI 870 rating conditions. Please include manufacturer's specification sheets verifying this information.

TABLE 3 – GUIDELINES FOR COOLING AND HEATING HOURS		
Business Type	Cooling Hours	Heating Hours
Convenience Store	986	1,546
Education – Community College	785	1,616
Education – Primary	408	1,916
Education – Secondary	563	2,098
Health/Medical – Clinic	865	1,830
Health/Medical – Hospital	1,298	2,054
Lodging	754	1,934
Manufacturing	589	1,144
Office – Low Rise	446	1,610
Office – Mid Rise	651	1,793
Office – High Rise	1,263	1,760
Other/Miscellaneous	729	1,739
Restaurant	652	1,530
Retail – Large Department Store	686	1,444
Retail – Strip Mall	574	1,393
Warehouse	409	1,533

TABLE 2 – Qualifying Efficiencies and Rebate Schedule – Ground Source Heat Pumps (GSHP)				
Code	Qualifying Equipment	Minimum Efficiency	Base Rebate (\$/Ton)	EER Bonus Rebate** (\$/Ton)
CL-W2A-20	Closed-Loop Water-to-Air GSHP	17.1 EER and 3.6 COP	\$200	\$20
CL-W2W-20	Closed-Loop Water-to-Water GSHP	16.1 EER and 3.1 COP	\$200	\$20
OL-W2A-20	Open-Loop Water-to-Air GSHP	21.1 EER and 4.1 COP	\$200	\$20
OL-W2W-20	Open-Loop Water-to-Water GSHP	20.1 EER and 3.5 COP	\$200	\$20
DGX-20	Direct Exchange GSHP	16.0 EER and 3.6 COP	\$200	\$20

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

^ Total Rebate not to exceed \$400/ton.

## GROUND SOURCE HEAT PUMP SYSTEMS – INSTALLATION CHECKLIST

### 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 and warranty information turned in to manufacturer.
- 21. A second meter has been installed for RPU customers who choose to participate in the High Efficiency HVAC Rate program.** (For more information, visit [www.rpu.org](http://www.rpu.org) or contact an RPU Commercial Account Representative.)
22. 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: \_\_\_\_\_

## SECTION E. 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-served 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. The Utility reminds you to follow all local permitting and building code ordinances.

### 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 \$100,000 per customer location per technology per year.

### 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 model number, 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. Vendors or contractors are not eligible to receive their customer's rebate. Please allow 6-10 weeks from the date of application submission for delivery of rebate check or bill credit. The Utility reserves the right to apply the rebate to past due accounts.

### 6. EQUIPMENT ELIGIBILITY REQUIREMENTS

Equipment must be new. Eligible high-efficiency heat pumps must meet or exceed The Utility's minimum efficiency requirements as identified in Tables 2, 4, and 6 according to its qualifying equipment description/category.

**Qualifying Water-to-Air Ground Source Heat Pump** efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at [www.ahridirectory.org](http://www.ahridirectory.org). EER rating is at AHRI/ISO 13256-1 cooling conditions of 77 °F entering water temperature and 80.6 °F dry bulb/66.2 °F wet bulb entering air temperature (ground loop heat pump). A copy of the manufacturer's applicable unit rating must accompany this application.

**Qualifying Water-to-Water Ground Source Heat Pump** 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. EER rating is at AHRI/ISO 13256-2 cooling conditions of 77 °F entering water temperature and 53.6 °F leaving water temperature (ground loop heat pump). Please include manufacturer's specification sheets verifying this information.

**Qualifying Direct Exchange Ground Source Heat Pumps** must be rated in accordance with the AHRI 870 rating conditions. Please include manufacturer's specification sheets verifying this information.

### 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 and also may be used in our advertising efforts with your permission as granted in Section B of this rebate application.

#### MAIL OR EMAIL COMPLETED APPLICATION AND REQUIRED DOCUMENTATION TO YOUR UTILITY PROVIDER:

##### Austin Utilities

Attn: Rebate Processing  
1908 14th St NE  
Austin, MN 55912-4904  
507-433-8886  
[www.austinutilities.com](http://www.austinutilities.com)  
[rebates@austinutilities.com](mailto:rebates@austinutilities.com)

##### Owatonna Public Utilities

Attn: Rebate Processing  
PO Box 800  
Owatonna, MN 55060  
507-451-2480  
[www.owatonnautilities.com](http://www.owatonnautilities.com)  
[rebates@owatonnautilities.com](mailto:rebates@owatonnautilities.com)

##### Rochester Public Utilities

Attn: Rebate Processing  
4000 E River Rd NE  
Rochester, MN 55906-2813  
507-280-1500  
[www.rpu.org](http://www.rpu.org)  
[rebates@rpu.org](mailto:rebates@rpu.org)