

# **SMART WATTS**

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## **REBATE ADMINISTRATION PLAN**

# Small Business Program Summary

The City of Fort Lauderdale actively encourages the implementation of projects that promote environmental sustainability within all areas of our community. A valuable component of sustainability is becoming more conscientious of energy use and seeking ways to make changes that reduce our carbon footprint.

To assist small businesses with becoming more sustainable, the City of Fort Lauderdale is offering the Smart Watts Small Business Energy Efficiency Rebate Program, which is a grant-funded initiative to assist Fort Lauderdale's small businesses with purchasing qualified energy efficient equipment. Eligible businesses that participate in the program may receive a 50% rebate on qualified purchases. Rebates are offered on a first-come, first served basis and are limited to \$1000. **There is a limit of one rebate per small business.**

## Eligible Applicants

- ✓ Operates as a genuine small business or non-profit with annual revenues less than \$7 million
- ✓ Headquartered within the City of Fort Lauderdale
- ✓ Properly licensed and registered
- ✓ Current with all City taxes
- ✓ Permission from property owner, if building not owner-occupied. A formal agreement must be signed by both parties.

## Energy Saving Equipment Eligible For Rebate

- Wall and ceiling insulation
- Central air conditioning systems (15 SEER or higher)
- Central heating (high efficiency ENERGY STAR® electric heat pumps 15 SEER / 8.2 HSPF or higher, or natural gas furnace)
- ENERGY STAR® exterior windows & glass door replacements
- Solar Panels (Photovoltaic Systems)
- Solar water heaters
- Gas tankless water heaters

All items must meet the minimum requirement of the Florida Building Code and, if applicable, have an ENERGY STAR label. All expenditures under this project will comply with federal regulations as outlined in Appendix A of this package.

## Application Process

Applicants are required to submit an application for preliminary approval that includes an Energy Survey Report, the type of energy-efficient product or system the business plans to install, and a written estimate of the work. Approved applicants have up to four months to complete the work and submit a rebate request form. If an applicant does not submit the rebate request within four months of their approval date, the unused funding will be reallocated to applicants who were placed on a waiting list.

**1. Energy Assessment.** All projects must include a Business Energy Evaluation from Florida Power and Light. These assessments are available at no cost to eligible small businesses and can be conducted online or on-site: [http://www.fpl.com/business/energy\\_saving/programs/energy\\_evaluation.shtml](http://www.fpl.com/business/energy_saving/programs/energy_evaluation.shtml). It is recommended that the business schedule an on-site visit to obtain the most complete and accurate assessment.

**2. Complete a Pre-Project Approval Application.** A complete application must include the following information listed below. An incomplete application will not be processed and returned to applicant.

- a. Owner Information. Identifies the owner/company that is applying for the rebate as well as other information, including but not limited to: number of employees, location, Employer Identification Number (EIN), other contact information.
- b. Energy Assessment. See Section 1 above. Applicant must submit a copy of the Energy Assessment as part of the Project Approval Application.
- c. Energy Saving Equipment Information. Select the type of energy saving equipment you plan to install. The energy efficiency improvement selected must meet requirements listed in Eligible Equipment section above.
- d. Contractor estimates detailing 1) material and equipment costs, and 2) on-site labor. Contractors must also include a completed "Waste Disposal Plan" form (attached) detailing how all waste generated by the project will be disposed. Two estimates are required. The City recommends you secure at least three. If using a contractor, energy efficient items must be installed by a licensed Florida contractor.
- e. Property Owner Release. A formal agreement between the building owner and tenant, if the property is not owner-occupied, granting permission for the proposed work.
- f. Utility Data Authorization. This information will only be used to track the project's impact in reducing energy consumption.

**3. Mail Completed Application.** Fully completed and documented applications should be mailed to: John Madden, City of Fort Lauderdale Building Services Center, 700 N.W. 19<sup>th</sup> Avenue, Fort Lauderdale, FL. 33311-7834. Keep a copy of the application and all documentation for your records.

**4. Application Review.** Applications will be reviewed to determine an applicant's eligibility for the rebate. The applicant will be notified that the application has been received and whether anything is missing. Incomplete applications will not be considered. Completed applications will be reviewed within three weeks of receipt.

**5. Acceptance Letter.** A formal decision of approval or denial will be sent to the applicant. All approved applicants will receive a notification letter that will include a project identification number, and additional instructions for procedure. Approved applicants have up to 4 months to purchase and install the proposed energy saving equipment. Only those items included in the pre-project application approval that have been permitted, installed, and receive a final inspection from the Building Department will qualify for this rebate.

**6. The applicant must receive the acceptance letter and obtain permits from the City prior to commencing work.** After installation, when the approved applicant applies for the rebate, proof of payment will be required.

**7. Utilize one of the approved contractors identified in your eligibility application.** Business owners must make their own inquiries as to the reputation and reliability of a Licensed Contractor before engaging their services. Contractors must have a current license as a contractor for the proposed work and be registered with the City. In order to maximize the impact of this program on our local economy, businesses are encouraged to select a local contractor and purchase supplies from local establishments whenever possible.

- Tell the contractor you want to implement one of the energy retrofits on the Rebate Program List that meets Energy Star standards, or for ceiling or wall insulation, the requirements attached. You are encouraged to verify through the Federal website that the proposed product or system does indeed meet the ENERGY STAR standards ([www.energystar.gov](http://www.energystar.gov)).
- Ask for a thorough explanation when you receive a written estimate, and make sure you understand the basis for every recommendation for improvement. Businesses should satisfy themselves as to any necessary warranties or guarantees for products or services provided.

**8. Save proof of completed work.** As you proceed with the purchase and installation of the energy retrofit, make sure you obtain the following documentation:

- a. Copy of dated, itemized receipt or other proof of payment with name and address of company performing the installation.
- b. Copies of permit and final inspection approval
- c. Verification that equipment is ENERGY STAR qualified

**9. Complete the Rebate Request Form.** The Rebate Request Form must be received within four (4) months of application approval to be eligible for the rebate payment. A copy of the Rebate Request Form is available online or by contacting Customer Service at 954-828-8000. Attach all required documentation to the completed application and make copies of everything. These copies can assist with application processing should there be questions regarding your submittal.

*Participants should be aware that the Internal Revenue Service requires reporting of rebates as income if they exceed \$600 in one year. Participants will be required to submit a W-9 form with their Rebate Request Form to enable that reporting.*

**10. Mail Your Submission.** Complete packages should be mailed to:

Attn: John Madden  
City of Fort Lauderdale Building Services Center  
700 NW 19th Avenue  
Fort Lauderdale, FL 33311-7834

Once your Rebate Request Form has been approved, you will receive a rebate check in the mail.

## PROGRAM FUNDING

Funds are available on a first-come first-served basis until all the funds allocated for this program have been expended. Rebates are reserved, but not guaranteed for applicants that have been approved to participate in the program. If completed Rebate Request Forms are not submitted within the four-month time period, businesses will need to re-apply for program approval. Accordingly, businesses are encouraged to apply and complete the work as soon as possible to take advantage of the program funds. All funds must be expended by the end of the grant term, which is August 30, 2012, but they are expected to be fully committed well before then.

**Questions?** For additional information, please contact City of Fort Lauderdale Customer Service at 954-828-8000 or [www.fortlauderdale.gov/rebates](http://www.fortlauderdale.gov/rebates).

# Smart Watts Small Business Energy Efficiency Program Pre-Project Approval Application

## PART 1 – APPLICANT INFORMATION

Address of Property Being Improved: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Name: *(Company applying for program)* \_\_\_\_\_

Owner(s)/Principle(s) Name: \_\_\_\_\_

Business Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_

Owner/Principle Mailing Address *(if different from above)*: \_\_\_\_\_

Taxpayer ID Number: \_\_\_\_\_ ROC#: \_\_\_\_\_

City of Fort Lauderdale Business Tax License Number: \_\_\_\_\_

NAICS Code / Type of Business *(brief description)* \_\_\_\_\_

Number of Full-time Employees: \_\_\_\_\_ Annual Revenues: \$ \_\_\_\_\_

Own or Lease Property: \_\_\_\_\_ Own \_\_\_\_\_ Lease

If Lease: Building Owner's Name & Telephone: \_\_\_\_\_

*If Business Owner and Property Owner are not the same entity, the application must include a completed Property Owner's Consent Form to be eligible for the program.*

NOTE: Omission of required information may delay or prohibit processing.

## PART 2 - CERTIFICATION FOR COMPLIANCE WITH FEDERAL, STATE AND LOCAL REQUIREMENTS

I certify:

1. The information contained herein is accurate.
2. The business and property owner(s) are current with all City obligations, *including but not limited to taxes, licenses, water revenue billings, etc. All permits, licenses, environmental and historical requirements associated with the above work shall be complied with.*
3. I have read and will comply with the requirements outlined in the Smart Watts Small Business Energy Efficiency Rebate Program.

4. I certify that all expenditures under this project will comply with federal regulations as outlined in Appendix A of this application.

FAILURE TO COMPLY WITH THE ABOVE WILL MAKE YOU INELIGIBLE FOR THIS REBATE.

OWNER OR DESIGNATED REPRESENTATIVE

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

### **PART 3 – ENERGY ASSESSMENT**

A Small Business Energy Assessment is required for an application to be approved. Please refer to the Program Guidelines for specifics. Please include the following information about the energy audit.

Date the analysis was completed: \_\_\_\_\_

ENERGY AUDIT COMPLETED (CHECK ONLY ONE):

\_\_\_\_\_ ONLINE through Florida Power and Light (FPL)

\_\_\_\_\_ ON SITE through Florida Power and Light

Name of Qualified Person who performed the analysis including relevant credentials:

\_\_\_\_\_

### **PART 4 – BRIEF IMPROVEMENT DESCRIPTION**

Please check which one of the following energy improvements you are interested in applying for:

- \_\_\_\_\_ HVAC Central AC / Heating System
- \_\_\_\_\_ Insulation
- \_\_\_\_\_ Tankless Gas Water Heater
- \_\_\_\_\_ Solar Water Heater
- \_\_\_\_\_ ENERGY STAR rated Doors or Windows
- \_\_\_\_\_ PhotoVoltaic System (Solar Panels)

### **PART 5 – PROJECT COST ESTIMATES**

Please complete estimated cost of improvement. Rebates are for material/equipment costs only. The maximum rebate is 50% of material/equipment costs up to \$1,000.

Improvement Type	Material/Equipment Costs	On-Site Labor Costs	Total Costs
	\$	\$	\$
	\$	\$	\$

**PART 6 – ADDITIONAL DOCUMENTS REQUIRED – Please attach the following:**

- Completed Energy Assessment Report
- Contractor estimates detailing 1. on-site labor and 2. material and equipment costs. Two estimates are required, but we recommend you secure at least three.
- Waste Disposal Plan Form (should be filled out by selected contractor)
- Agreement Between Building Owner (if this is not you) and Tenant granting permission for the proposed work.

**PART 7 – UTILITY CONSUMPTION**

Based on the Energy Assessment Survey, the annual energy savings from the improvement purchased through this rebate is estimated at:

\$ \_\_\_\_\_

In signing and submitting this application, I agree to authorize FPL to release my energy consumption data to the City of Fort Lauderdale to document pre and post energy savings. I understand no records shall be sent to any other organization without a new authorization from my business. This authorization will remain in effect for 12 months after the date on the approval letter received from the City.

Please submit all applications and required documentation via email or mail to:

Attn: John Madden  
City of Fort Lauderdale Building Services Center  
700 NW 19th Avenue  
Fort Lauderdale, FL 33311-7834  
jmadden@fortlauderdale.gov

NOTE: All work must be completed and Post-Project Rebate Request Form must be submitted within 4 months of the date of application approval.

# Smart Watts Small Business Energy Efficiency Program Post-Project Rebate Request Form

## INSTRUCTIONS:

1. Complete all appropriate sections of the Rebate Request Form and attach all required documentation, including the attached W-9 tax payer identification form.
2. Within four (4) months of date of approval of application, return completed Rebate Request Form(s) to the address below:

Attn: John Madden  
City of Fort Lauderdale Building Services Center  
700 NW 19th Avenue  
Fort Lauderdale, FL 33311-7834

**Questions?** For additional information, contact City of Fort Lauderdale Customer Service at 954-828-8000 or email [rebates@fortlauderdale.gov](mailto:rebates@fortlauderdale.gov).

Keep a copy of all documents submitted for your records.

### Applicant Information

First Name	Last Name	
Street Address:		
City: Fort Lauderdale	State: Florida	Zip Code:
Email Address:	Phone:	
Approval ID # (On Approval letter):		

Complete ONLY the section that applies to your business:

Section A: HVAC: Central AC / Heating System

Name of Participating Contractor:	
Date Installed:	
Type of Equipment Installed:	SEER/EER:
Tons:	Manufacturer:
Type of Equipment Removed:	SEER/EER:
Tons:	Approximate Age:
Total Cost (excluding taxes and labor):	
Rebate Amount Requested	
50% of total cost up to \$1,000 excluding taxes and labor:	

Documents to Attach (please initial):

- \_\_\_\_\_ Copy of dated, itemized receipt or other proof of payment with notation by Participating Contractor of verification of ENERGY STAR qualified equipment energy efficiency and Manual J calculation
- \_\_\_\_\_ Copy of permit and final inspection approval

Section B: Insulation

Name of Participating Contractor (if applicable):	
Date Installed:	
Type of insulation:	Square Footage:
New R-Value:	Existing R-Value (if known):
Total Cost (excluding taxes and labor):	
Rebate Amount Requested: 50% of total cost up to \$500 excluding taxes and labor:	

Documents to Attach (please initial):

If completed by Business:

- Copy of dated, itemized receipt or other proof of payment
- Copy of packaging showing product name and R-value
- Copy of permit and final inspection approval

If completed by Contractor:

- Copy of dated, itemized receipt or other proof of payment with notation by Contractor of type of insulation R-Value, coverage in square feet
- Copy of permit and final inspection approval

### Section C: Gas Tankless Water Heater

Name of Participating Contractor:	
Date Installed:	
Model Number:	Manufacturer:
Total Cost (excluding taxes and labor):	
Rebate Amount Requested - 50% of total cost up to \$1,000 excluding taxes and labor:	

Documents to Attach (please initial):

- \_\_\_\_\_ Copy of dated, itemized receipt or other proof of payment with notation by Participating Contractor showing manufacturer and model
- \_\_\_\_\_ Proof of ENERGY STAR qualification such as:
  - A copy of photo of product energy guide label with ENERGY STAR logo
  - A copy of the relevant pages of the owner's manual indicating ENERGY STAR qualification
- \_\_\_\_\_ Copy of permit and final inspection approval

### Section D: Solar Water Heater

Name of Participating Contractor:	
Date Installed:	
Total Cost (excluding taxes and labor):	
Rebate Amount Requested - 50% of total cost up to \$1,000 excluding taxes and labor:	

Documents to Attach (please initial):

- \_\_\_\_\_ Copy of Florida Solar Energy System Approval Form
- \_\_\_\_\_ Copy of permit and final inspection approval
- \_\_\_\_\_ Copy of dated, itemized receipt or other proof of payment with notation by Participating Contractor showing manufacturer and model

Section E: ENERGY STAR Doors or Windows

Name of Participating Contractor:	
Date Installed:	
Number of Windows:	Type Installed:
Number of Doors:	Type Installed:
Total Cost (excluding taxes and labor):	
Rebate Amount Requested – 50% of total cost up to \$1,000 excluding taxes and labor:	

Documents to Attach (please initial):

- \_\_\_\_\_ Copy of dated, itemized receipt or other proof of payment with notation by Participating Contractor showing ENERGY STAR designation for each window or door being submitted for rebate
- \_\_\_\_\_ Copy of permit and final inspection approval

Section F: Photovoltaic (PV) System

Name of Participating Contractor:	
Date Installed:	
Total Cost (excluding taxes and labor):	
Rebate Amount Requested - 50% of total cost up to \$1,000 excluding taxes and labor:	

Documents to Attach (please initial):

- \_\_\_\_\_ Copy of Florida Solar Energy System Approval Form
- \_\_\_\_\_ Copy of permit and final inspection approval
- \_\_\_\_\_ Copy of dated, itemized receipt or other proof of payment with notation by Participating Contractor showing manufacturer and model