

PDC PROJECT MANAGEMENT GUIDE

PMG-E04: ENERGY REBATE PROCESS

PURPOSE: To describe the Energy Rebate Process

A. Introduction

The purpose of the Energy Rebate is to ensure installation of efficient equipment and systems that can benefit the University for the long term and to obtain one time financial incentive benefit from the utility provider(s) that can be used to further improve the energy efficiency across campus.

The University of Florida’s electrical supply is provided by two utility companies; Duke Energy (DE), main provider, supplies electricity to main campus, while Gainesville Regional Utilities (GRU) supplies to the surrounding area. Each of these companies has an established rebate program however they differ from one another substantially. For example, DE’s rebate program is for new construction and retrofit projects while GRU only provides rebates on retrofit projects. Below outlines how to maximize rebate opportunities while also obtaining funding once the project is complete.

In order to qualify for rebates, approved equipment and materials must be installed and operational. In Addition, Duke Energy will **only** process rebates up to one year from the project’s Certificate of Occupancy (CO) date or the invoice date, whichever is later.

B. Process

Design phase: Integrating Equipment and Material into every project; major and minor

- 1) At the design charette/scope establishment, rebate integration into the project must be discussed. The rebate form is posted on PDC main website under forms for project team easy access. <http://www.facilities.ufl.edu/projects/forms.php>
- 2) The rebate form is posted on PDC SharePoint site/project page. PM must review the rebate form with the design and construction team and eliminate the tabs that does not apply to his/her project
- 3) As part of University sustainability initiative, rebate process is discussed in detail during sustainability and green building/LEED session at the charrette and throughout design reviews.
- 4) List of qualified equipment and materials for rebates must be finalized by the project team at the Schematic Design (SD) phase to be integrated into the project design and retrofit.
- 5) Project manager shall confirm integration of the list into the project throughout design phases. Obtain a confirmation from the design team before process invoice related to each design phase.
- 6) During pre- construction phase, Contractor must get familiar with the rebate process and understand his/her role.

C. Construction Phase: Compile Documentation for Rebate Application

- 1) The UF PM shall provide a copy of the rebate form to the construction team along with instructions for completing the form and compiling the required documentation (e.g., product data sheets, invoices, floor plans, copy of CO, etc.).

- 2) This process should begin **as the appropriate submittal and shop drawings are approved.**
- 3) PM to confirm with the CM the ongoing compiling of systems and equipment cuts sheets and invoices during submittal approval and package buyout.

D. Submission

- 1) The completed rebate form and all the backup information shall be provided by or before Substantial Completion (SC).
- 2) The completed form and submission by SC is part of project closeout documents per minor and major contracts.
- 3) The UF PM shall upload the form and backup documentation to the LEED library in the project's SharePoint site and advise the rebate coordinator.
- 4) The rebate coordinator shall review the documentation and provide to Duke Energy.
- 5) Duke Energy will review and verify the application and will visit all projects to audit/gather equipment information and find out the operation hours and equipment operation issues prior to equipment installation, renovation, etc.
- 6) Duke Energy requires an inspection on all rebates processed for \$10K or greater. In addition, an inspector can elect to inspect any project where Duke Energy issues a rebate.

E. Innovative Incentive Program (IIP)

- 1) Certain other requirements apply to systems, products, or technologies for which prescriptive DE rebates do not currently exist, such as chill beams and other systems and equipment that are energy efficient but are not listed on Duke Energy prescriptive rebate list.
- 2) Review the IIP application and application instructions during early design, ASD.
- 3) IIP form and instructions are on SharePoint <https://connect.ufl.edu/fpc/rebate/default.aspx>
- 4) IIP application process requires that the application be submitted to Duke Energy prior to the installation of the applicable technologies.
- 5) If the pay back is less than two years, the project is not eligible for an IIP application.
- 6) Submit IIP application to rebate coordinator for review.
- 7) Rebate Coordinator reviews application and submit to Duke Energy for review after the 100% CD issued.
- 8) See rebate coordinator for other questions.

F. Other Energy Providers

- 1) Gainesville Regional Utility (GRU) is another utility provider to UF.
- 2) GRU only issue rebate to retrofit projects at this time.
- 3) See GRU rebate form on PDC main website for project team easy access <http://www.facilities.ufl.edu/projects/forms.php>

The same above process of integration into design and completion submittals apply here.

- All Rebate check to be distributed to the entity that funded the project, for example IFAS, Housing, UAA, and Aux will get their rebate checks. E&G projects will receive their rebate checks.