Natural Gas-Powered Pump Retrofit Incentive Application

The Advanced Pumping Efficiency Program (AEP) is funded through Pacific Gas & Electric Company (PG&E) under the auspices of the California Public Utilities Commission. AEP is intended to encourage energy and water conservation through education and incentives that encourage retrofit of inefficient pumps.

Who is Eligible for AEP?

Owners or users of a PG&E non-residential electric or natural gas utility account that is primarily used for pumping water for production agriculture, landscape or turf irrigation, or municipal purposes, including potable and tertiary-treated (reclaimed) water but excluding pumps used for industrial processes, raw sewage, or secondary-treated sewage, and who are paying the Public Purpose Program Charge are eligible. Other factors may apply. Refer to the AEP Policies and Procedures Manual or contact the AEP Program Office for full eligibility criteria.

What Projects are Eligible for AEP?

IMPORTANT! AEP requires a pump efficiency test be performed prior to and after the retrofit project. These tests cannot be more than three (3) years apart. AEP can accept applications for retrofit incentives after the project is completed but the application must be completed within two (2) years after the post-project test. This includes submittal of copies of the pre- and post-project pump tests, invoices, and the completed and signed application form.

Incentives are available ONLY for retrofit or replacement of either or both of the pump bowl and impeller. Work can be contracted or performed wholly or partially in-house if such capability exists. However, in-house labor rates and other costs cannot exceed the average of rates and costs charged by the two closest commercial pump service contractors.

Note these important additional eligibility factors:
- Only one pumping system, with one discharge point, is eligible per application. Projects involving multiple pumping systems, at different locations or on different meters, are not eligible. (A well with a booster pump located at the well, and in series with the well, is an eligible pumping system.)
- Only one incentive per individual pump will be paid in any one six-year period.
- The pump must be operational. AEP will not provide an incentive for a broken or inoperable pump.
- No incentives will be provided for retrofit or replacement of the engine or gear-drive.
- Retrofits intended to change the operating condition or use of the pump are not eligible, e.g., changing a well pump from low pressure flood irrigation to high pressure drip irrigation.
- No incentive will be provided to construct or finish a new water well. However, ask about PG&E’s Savings By Design Program for incentives for new construction projects.

No incentives will be provided for pump impeller adjustments, well rehabilitation projects, projects intended to reduce air entrainment, or projects intended to reduce total dynamic head.

Incentives under AEP cannot be combined with other utility grant, rebate, or service programs, or with grants, rebates or services offered by any other state or local government agency for the same measure.

How to Obtain an Incentive

Electric accounts should contact the AEP Program Office for the correct application form. This form is for natural gas accounts only.

1. Complete and sign the Application Contract on PAGES 1a and 1b. Read all statements carefully. By signing this contract you are certifying that all statements are true. YOU ARE NOT COMMITTING TO COMPLETING THE RETROFIT BY SIGNING THIS APPLICATION! It is only an agreement regarding the incentive that might be paid to you.

2. Calculate the Potential Incentive on PAGE 2. We will do this for you if you prefer.

3. Describe the project as much as possible using PAGE 3.

4. Make a copy of the entire Application and documentation and mail the following to the AEP Program Office:
   - The original signed completed PAGES 1 – 3 of the Application.
   - Copy of a pre-project pump efficiency test.
   - Copy of project pump tests, including replacement of parts, labor, and diagnostics.
   - Copy of cancelled checks along with invoices from the pump service company.

   We will notify you of Application approval, rejection, or the need for more information.

5. When the accepted project is complete, paid for, and the post-retrofit pump test is completed, mail the following to the AEP Program Office:
   - The “Certificate of Project Completion” fully completed.
   - Copies of invoices marked PAID by the pump service company or copies of cancelled checks along with invoices from the pump service company.
   - Copy of the post-retrofit pump efficiency test.

   IMPORTANT! The invoices must clearly state all work that was performed, including replacement of parts, labor, and diagnostics.

All material should be mailed to:

Advanced Pumping Efficiency Program
6014 N. Cedar
Fresno, CA 93710

If you have any questions or need help in completing this form, please contact the AEP Program Office at (800) 845-6038.

The Advanced Pumping Efficiency Program (AEP) may be terminated or modified without notice. AEP has a limited budget and all incentives are subject to availability of AEP funding. Applications are accepted on a first-come, first-served basis until available funds are exhausted or the end of AEP, whichever comes first. Check AEP’s Policies and Procedures Manual posted on the web site at www.pumpefficiency.org or call (800) 845-6038 for up-to-date information. You may be eligible for other Public Purpose Program Charge efficiency programs. Log on to web site www.californiaenergyefficiency.com or web site www.pge.com for more information.
I, the Applicant, agree to the following terms and conditions:

The following is an Agreement between PACIFIC GAS and ELECTRIC COMPANY (“PG&E”) and you, the “APPLICANT”.

The following is an Agreement between PACIFIC GAS and ELECTRIC COMPANY (“PG&E”) and you, the “APPLICANT”.

I, the Applicant, agree to the following terms and conditions:

1. I have read and understand the Policies and Procedures Manual of the Advanced Pumping Efficiency Program (“Program”) operating in the PG&E territory, especially those parts pertaining to the application for, and calculation of, the incentive for a pump retrofit/replacement. I am an eligible Applicant, and this is an eligible pump retrofit/replacement project under the terms of the Program. I plan to purchase and install the equipment indicated on Page 3 of this Application. This will be for use at my place of business and not for resale.

2. The information I have supplied and included with this Application is true, correct, and complete.

3. If my application is deemed to be incomplete or incorrect by the Program, I agree to supply additional information or application corrections within three (3) months from the date of application. I understand that if I do not supply the information or corrections within this time period, the application shall be deemed expired and PG&E shall not have an obligation to the Applicant.

4. I agree that an approved Application shall expire and no incentive paid if; a) the Application is not completed, including submittal of the Certificate of Project Completion and all supporting documentation to the Program within two (2) years of the post-project pump test or b) the Program ends or c) California Public Utility Commission funds for the Program are unavailable or otherwise inaccessible to the Program and PG&E.

5. I agree that the maximum incentive that I can receive is the approved Potential Incentive as of the date of Application approval.

6. I certify that this pumping system, pump and power source was operational at the time of the retrofit/replacement. I further certify that this is solely to improve the operating efficiency of the pumping system and not for the purposes of substantially changing the intended operating condition of the pumping system, (e.g., from low pressure to high pressure operation).

7. I have read and understand the terms and conditions on this Application and agree to abide by the rules, requirements, and terms set forth on this Application.

8. If this Agreement is terminated for any reason, PG&E shall not be liable to the Applicant for damages or compensation of any kind.
9. I will supply documentation establishing paid proof-of-purchase. This will be done by attaching copies of all invoices marked “PAID” by the repair company to the Certificate of Project Completion and submitting the Certificate to the Program. I have attached documentation, or will supply documentation, establishing electricity use and pump performance as required by the terms of the Program.

10. PG&E reserves the right to determine eligibility for the Incentive program.

11. NEITHER PG&E NOR THE CALIFORNIA STATE UNIVERSITY, FRESNO FOUNDATION (“FOUNDATION”) MAKES ANY REPRESENTATION OR WARRANTY, NOR ASSUMES ANY LIABILITY WITH RESPECT TO QUALITY, SAFETY, PERFORMANCE, OR OTHER ASPECT OF ANY DESIGN, SYSTEM OR EQUIPMENT INSTALLED OR REPAIRED PURSUANT TO THIS AGREEMENT, AND THEY EXPRESSLY DISCLAIM ANY SUCH REPRESENTATION, WARRANTY OR LIABILITY. APPLICANT AGREES TO INDEMNIFY PG&E, THE TRUSTEES OF THE CALIFORNIA STATE UNIVERSITY, THE FOUNDATION, CALIFORNIA STATE UNIVERSITY, FRESNO, AND ANY OF SAID ENTITIES’ AFFILIATES, SUBSIDIARIES, PARENT COMPANY, OFFICERS, DIRECTORS, AGENTS, AND EMPLOYEES AGAINST ALL LOSS, DAMAGE, EXPENSE, FEES, COSTS, AND LIABILITY ARISING FROM ANY DESIGN OF SYSTEM OR EQUIPMENT INSTALLED.

12. Both funding and the conditions of the Incentive are subject to the jurisdiction of the California Public Utilities Commission (CPUC) and shall be subject to such changes or modifications as the CPUC may, from time to time, direct in the exercise of its regulatory authority. If there are changes in the Incentive, PG&E will endeavor, but cannot guarantee, to provide a reasonable period of time before changes go into effect.

13. I understand that if the Program is modified in any way or terminated by order of any government entity, then this Agreement shall be revised or terminated consistent with that order.

14. PG&E may assign this Agreement, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise, without the Applicant’s prior written consent, provided PG&E remains obligated for payments incurred prior to the assignment. The Applicant may not assign this Application, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of PG&E.

15. I understand the Incentive requires inspections and measurements of the improved performance of the efficiency project. Therefore, I agree to provide access to the Project Site for these purposes to PG&E and/or its agents or assigns and the CPUC and/or its agents or assigns.

16. Funding approved for this Program is limited and will be paid on a first-come, first-served basis to qualified applicants. Funds will only be reserved upon Applicant’s acceptance into the Program. This Incentive offer is subject to the availability of authorized funds.

17. I agree to release PG&E, the Trustees of the California State University, the Foundation, California State University, Fresno, and all of said entities’ affiliates, subsidiaries, parent company, officers, directors, agents, and employees from all claims, demands, losses, damages, costs, expenses, and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, including but not limited to employees of PG&E, Foundation, Applicant, or any third party; (2) injury to property or other interests of PG&E, Foundation, Applicant or any third party; (3) violation of local, state, or federal common law, statute, or regulation, including but not limited to environmental laws or regulations; (4) energy savings shortfall; so long as such injury, violation, or shortfall (as set forth in (1) - (4) above) arises from or is in any way connected with the Project, including any third party’s performance of or failure to perform the Project, however caused, regardless of any strict liability or negligence of PG&E, Foundation, or said entities’ officers, managers, or employees.

18. I certify that no other grant, incentive, rebate, or service from a utility, state, or local government-sponsored program has been, or will be, received in connection with the equipment purchased and installed under this contract. I authorize you to receive any and all information about me, or related to me, that you deem sufficient from any other energy efficiency program in order to verify this.

19. PG&E may suspend or terminate my Application, without cause, upon written notice to me.

Applicant Name (PRINT): ____________________________
Applicant Signature: ____________________________ Date: ______________

**Application Assistance Incentive:**

Applicant - Please complete and sign this section only if you were materially helped in completing the application form by an individual or company: I certify that I was materially helped in completing this application and an Application Assistance Incentive should be paid by APEP to the Assistor named below.

Applicant Name (print): ____________________________ Applicant Signature: ____________________________ Date: ______________

Name of person/company providing assistance: ____________________________

Mailing address of the assistor: ____________________________

City: ____________________________ State: __________ Zip: __________ Phone: ____________________________

Assistor’s Tax Status: □ Individual/Sole Proprietor □ Corporation □ Partnership □ Exempt (tax exempt, non-profit)

Assistor’s Tax ID Number: □ EIN □ Federal Tax ID □ SSN

Tax Liability: Incentives are taxable if greater than $600 and will be reported to the IRS unless the Assistor is exempt. PG&E will report the incentive as income to the Assistor on IRS form 1099 unless “Exempt” is marked as Tax Status. PG&E recommends that the Assistor consult a tax adviser concerning the taxability of incentives. PG&E is not responsible for any taxes that may be imposed due to Assistance Incentives.

California consumers are not obligated to purchase any full fee service or other service not funded by this program. This program is funded by California utility ratepayers under the auspices of the California Public Utilities Commission.

Los consumidores en California no están obligados a comprar servicios completos o adicionales que no estén cubiertos bajo este programa. Este programa está financiado por los usuarios de servicios públicos en California bajo la jurisdicción de la Comisión de Servicios Públicos de California.
Step 2 – Calculate the Potential Incentive

IMPORTANT NOTES!
1. APEP may use the change in therms required to pump an acre-foot of water in conjunction with the number of acre-feet pumped as the basis for calculating the potential incentive if the Overall Pumping Efficiency (OPE) cannot be measured.

2. You are calculating a Potential Incentive below. Your Actual incentive may differ from this!

3. If your pre-project pump efficiency test shows an Overall Pumping Efficiency greater than 16% we will use the actual performance improvement as the basis for your incentive calculations, not the rates shown below. Note that in these cases we may have to re-calculate the incentive depending on the actual results of your project.

4. In consultation with you, APEP will perform all calculations. There is also a spreadsheet available on the web site www.pumpefficiency.org that will perform the calculations. An example calculation is seen at the bottom of the Certificate of Completion page.

Instructions for calculating your Potential Incentive:
1. Calculate a Potential Incentive based on energy and demand savings. Please call us if you cannot find the last 12 months’ bills showing kilowatt hour usage and peak kilowatt demand. We will access your billing records.

2. Calculate a Potential Incentive based on 50% of the estimated project cost (it is not critical to know the project cost exactly if preparing the application before the project is completed).

3. Your Potential Incentive will be the lower of the two estimates.

### 1. Potential Incentive Calculated from Energy Savings

In the equation below:

\[
\text{Annual Therm} = \text{Annual therm usage ("Annual Therm") from:}
\]

- \( \text{Last 12 months’ energy use} \)
- \( \text{Estimate of next 12 months’ energy use – submit a reasonable and documentable estimate of the next 12 months’ energy use. Your incentive will only be paid after the actual next 12 months’ energy use is billed. The incentive will be based on the actual energy use, not the estimate supplied with the application. APEP staff will contact you if using the next 12 months’ energy use as the basis for your incentive.} \)

\[
\text{RATE} = $0.80/\text{Therm for projects started before January 1, 2009 or applications signed before January 1, 2009, otherwise RATE} = $1.00/\text{therm}
\]

APEP will round numbers during calculations for CPUC-reporting purposes. Your estimated incentive may not exactly match ours. Please call if you need further clarification. Use this method only if the pre-project OPE is 50% or less (40% or less if a submersible pump).

\[
\text{Potential Incentive} = 0.25 \times \text{RATE} \times \text{Annual Therm} = $
\]

### 2. Potential Incentive Calculated from Project Cost

Enter the estimated, or actual, Project Cost: __________________ Project Costs include all Time (labor or engineering) and Materials related solely to the retrofit or repair of either or both of the pump bowl and impeller

\[
\text{Potential Incentive} = 0.50 \times \text{Project Cost}
\]

\[
\text{Potential Incentive} = 0.50 \times \text{__________} = $
\]

3. Your Potential Incentive is the LESSER of the Potential Incentives calculated in Steps 1 and 2. – Enter the lower number as your Potential Incentive here $ _______________
1. **Engine:** Horsepower ________  Speed (rpm) ________
2. **EPA Emissions Rating** (if known): ☐ Tier 1  ☐ Tier 2  ☐ Tier 3
3. NA
4. NA
5. **Pump Type:** ☐ Well Vertical Turbine  ☐ Horizontal Centrifugal  ☐ Submersible  ☐ Short-coupled Vertical/Slant Turbine
6. **Impeller Type:** ☐ Unknown  ☐ Axial/Open  ☐ Semi-Open  ☐ Closed
7. **Pump Use:** ☐ Irrigation well  ☐ Livestock well  ☐ Ag Pressure boost  ☐ Low-lift canal/ditch  ☐ Tailwater return  ☐ Tertiary water
8. **Current Overall Pumping Efficiency (OPE)** (if known): ________
9. Estimated, or actual if known, post-retrofit **Overall Pumping Efficiency (OPE):** ________
10. **Current therm per acre-foot pumped (therm/AF):** ________
11. **Estimated** therm per acre-foot (therm/AF) after retrofit: ________
12. **Retrofit Actions** (check all that apply):
   - ☐ Engine replacement (describe type, efficiency rating)____________________________
   - ☐ Engine Overhaul
   - ☐ Bearing/spider replacement
   - ☐ Packing replacement
   - ☐ Impeller replacement (describe type, model)
   - ☐ Bowl/Volute retrofit
   - ☐ Bowl/Volute replacement (describe type, model)
   - ☐ Adding stage(s) (if a turbine)
   - ☐ Removing stage(s)
   - ☐ Modification of the immediate pump discharge piping or valving to reduce pressure requirements.
   - ☐ Well clean/modification to reduce drawdown (describe fully on a separate sheet)
   - ☐ NA
   - ☐ Other:____________________________________________________________________
13. **Have you attended an APEP educational seminar?** ☐ YES  ☐ NO – If “Yes”, approximately when? ________
14. **Did you retrofit this pump because of the results from a pump efficiency test?** ☐ YES  ☐ NO
   - If “Yes”, was the test performed by:
     - ☐ A Participating Pump Test Company of the Program
     - ☐ Another pump tester
   - If “Yes”, how long after the test did you retrofit the pump? _______ months
15. **Estimated completion date of retrofit:** ______________
16. **Farm Type:** ☐ General row crops  ☐ Vegetable  ☐ Citrus  ☐ Fruit  ☐ Nuts  ☐ Golf Irri.
    ☐ Dairy  ☐ Nursery  ☐ Cut Flowers  ☐ Sod  ☐ Vineyard  ☐ Apiary  ☐ Livestock
    ☐ Other:__________
17. **Total Acres Farmed:** ☐ 1-40  ☐ 41-160  ☐ 161-640  ☐ 641-1280  ☐ 1281-2560  ☐ 2561-6400  ☐ 6400+  ☐ Not Appl.
18. **Is there a flowmeter on this pumping system?** ☐ YES  ☐ NO
   - If “Yes”, what type is the flowmeter?
     - ☐ Std. Propeller  ☐ Digital Propeller  ☐ Velocity
     - ☐ Paddle Wheel  ☐ Acoustic  ☐ Doppler Radar

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**Step 4 – Mail Application Package to the APEP Program Office**

**Advanced Pumping Efficiency Program**

6014 N. Cedar  
Fresno, CA 93710

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**For Program Use Only (v. 2/26/2013)**  
PG&E Account Rep. LAN: __________________  
Local Office: __________________

Received: ______________  By:______________  How: ____________  Postmark: ______________

Approved / Rejected / Withdrawn on:______________  By:______________  Final therm: ____________  Final Incentive: ____________
1. When the project is complete and the post-retrofit pump test done, fill out the Certificate of Project Completion below with the same information as on the Application. Refer to your Notice of Application Approval from APEP for the Application number.

2. Attach all invoices marked “PAID” by the repair company, or copies of cancelled checks along with the invoices, and a copy of the post-retrofit pump test results to this Certificate. IMPORTANT! The invoices must clearly show all work that was performed including:
   - Retrofit/replacement of pump with before (if identifiable) and after pump model and number of stages.
   - Retrofit/replacement of other parts (bearings, column, shaft, etc.) and reason.
   - Labor on-site and in-shop.

3. Mail the invoices, copy of the post-retrofit pump test, and Certificate to the APEP Program Office at:

   Advanced Pumping Efficiency Program
   6014 N. Cedar
   Fresno, CA 93710

4. Please call the Program at (800) 845-6038 if you have any questions as to what you need to do to receive your incentive.

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**CERTIFICATION OF PROJECT COMPLETION AND AUTHENTICITY AND ACCURACY OF SUBMITTED INVOICES**

The Applicant hereby certifies that the pump retrofit/replacement project has been completed and the pump is operational.

The Applicant hereby certifies that all invoices submitted for the Incentive are original invoices (or copies of original invoices) that are authentic and accurately reflect costs that were incurred by the Applicant solely in direct connection with the Applicant’s submitted pump retrofit project.

Applicant Name (print): ____________________________ Application Number: __________________
Applicant Signature: ____________________________ Application Date: __________________
PG&E Meter Number: ____________________________ Account Number: __________________
Service Agreement ID: __________________________

Name appearing on PG&E bill: _______________________ Company Name: ______________________

Contact Person Name: ____________________________ Phone: ____________________ Fax: __________________

Start Date of Retrofit/Replacement: ______________ Completion Date of Retrofit/Replacement: ____________

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Example Calculation of Potential Incentive from Energy Savings (pre-project OPE is 16% or less - if the pre-project OPE is greater than this level please call the APEP office for assistance)

Assume:
- Project Cost of $8,500
- ANNUAL Therm = 15,000 Therm/year (in the 12 months prior to the pump retrofit)
- Project started 2/10/2010 and the pre-project pump efficiency test showed an Overall Pumping Efficiency of 13% (please call us if this is greater than 16%). Thus, RATE = $1.00/therm

Potential Incentive (energy) = \(0.25 \times \text{RATE} \times \text{ANNUAL Therm}\)
Potential Incentive (energy) = \(0.25 \times 1.00/\text{therm} \times 15,000 \text{ therm}\)
Potential Incentive (energy) = $3,750

Potential Incentive (project cost) = \(0.50 \times \text{Project Cost}\)
Potential Incentive (project cost) = \(0.50 \times 8,500 \times 8,500 = $4,250\)

The lower of the two Potential Incentives is $3,750 and that is the final Potential Incentive. The Actual Incentive may be recalculated when the project is completed and all documentation has been submitted.