



Your First Source for
Energy Savings

The Retroactive Incentive Sharing Plan



“WHAT’S IN IT FOR ME?”



Background/Rationale

- **Retroactive Opportunity**
 - Preapproval requirements for most incentive programs - suspended
 - Projects can be retroactively submitted; no preapproval required
- **Many Unsubmitted Retroactive Projects**
 - “Found” money for customers
- **Allies Need Incentive**
 - Completed projects do not represent new revenue
- **Third-Party Payment Option Available**

Plan

Incentive Split

- **Recommended* Split:**
 - Ally(ies): 25%
 - “General” Ally: 15%
 - “Sub” Ally: 10%
 - Customer (Participant): 75%

- **Ends May 15, 2011**

***Recommendation ONLY; Actual Splits Set by Ally/
Negotiated with Customer (and Sub Ally)**



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Benefits - Ally

- Additional Revenue
- Customer Goodwill
- Additional Sales Opportunities
- Familiar Process





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Benefits - Customer

- “Found” Money
- Hands-Off Process
- Do-It-Yourself Option Still Available



Procedure

- 1. Ally Finds Eligible Retroactive Projects**
 - Search sales records
 - Completed between 10/28/09 and 12/31/10
 - Met-Ed & Penelec: NOT available to Large C&I (>400kW) non-gov't. customers
 - Compare rate class code to list on website
 - Penn Power: ALL non-residential customers eligible
 - Motors & Drives - eligible in ALL utility areas, regardless of rate class
 - Cherry-picking – OK!

Procedure (Cont'd.)

- 2. Ally Proposes Program to Customer**
 - Example Customer proposal letter
 - Estimate customer's incentive share ahead of time
- 3. Upon Customer Acceptance, Ally Completes All Paperwork for Incentive Application**
- 4. Customer Signs Authorization Page and Third Party Payment Authorization Page**

Procedure (Cont'd.)

- 5. Ally Submits Completed Application**
 - Include cut sheets, invoices, payee (Ally) W-9 (if necessary)
- 6. SAIC Fast-Tracks Application Review**
 - Ten-business-day turnaround from receipt of complete retro application to final approval
- 7. Upon Approval, Incentive Payment is Sent to General Ally (GA) Within 90 Days**
- 8. GA Pays Customer Their Share**
- 9. (GA Pays Sub Ally Their Share)**

What Now?

- **Plan Outline – Emailed to All Allies**
- **Outreach Representatives Available**
 - Met-Ed: Danny Small – (610) 594-4301
 - Penelec: Ray Papcunik – (814) 241-3123
 - Penn Power: Linda Rasor – (484) 252-9101



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Questions?

