



PROJECT ASSESSMENT INCENTIVE GUIDE



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Partnering with Wisconsin utilities



HOW TO APPLY

NEED HELP? Call 800.762.7077

The FOCUS ON ENERGY® Project Assessment Incentive is designed to share a customer's investment in the external costs of studying and developing an energy savings project. An energy assessment is considered when significant potential savings are believed to be available, but the customer is uncertain of the specific application. The Assessment results are expected to provide sufficient information to make a sound decision regarding project implementation. Use this guide to help you move through the process.

UNDERSTANDING PROJECT ASSESSMENT INCENTIVES

The Project Assessment Incentive (PAI) provides an opportunity for industrial, school, government, and wastewater facilities to receive financial incentives for the study and development of complex custom project(s) increasing energy efficiency. The study is expected to result in an eligible custom incentive project. Customers completing assessments by June 30, 2022, may request an additional \$7,500, for a total of \$15,000. Customers completing assessments after June 30, 2022, may request up to \$7,500. The assessment incentive is capped at 50% of project cost or 20% of estimated annual energy cost savings.

Approval of the PAI is required prior to initiating the assessment. Approval of the PAI is not guaranteed.

STEP 1

BEFORE YOU APPLY

- Confirm your gas and/or electric utilities participate in Focus on Energy at focusonenergy.com/utilities.
- Contact your Focus on Energy Advisor for assistance. If you do not know who your Energy Advisor is, go online at focusonenergy.com/EA-map or call 800.762.7077 for assistance.

STEP 2

WHAT YOU'LL NEED

- Project Assessment Incentive application. All sections of this form must be completed.
- A proposal detailing the following:
 - The work to be performed.
 - A clear statement of what is being assessed and why.
 - A list of the deliverables for the final report, including:
 - Summary of findings including a statement on project feasibility.
 - Energy savings estimates and supporting calculations.
 - Project cost estimates.
 - Any data collected and used in the assessment.
- A detailed report of the study containing the deliverables defined in the assessment proposal will be required prior to payment of the assessment incentive.

STEP 3

UNDERSTAND YOUR INCENTIVE AND OFFERING REQUIREMENTS

- This incentive is limited to 50% of the final cost of the assessment, up to \$15,000 for assessments complete by 6/30/22. Assessments completed after 6/30/22 are eligible for a maximum incentive of \$7,500.
- The incentive cannot exceed 20% of the estimated annual cost savings based on the best available data prior to the assessment. Preliminary savings estimates are subject to review prior to pre-approval.
- Approval from Focus on Energy is required prior to beginning the assessment.
- Prescriptive measures and renewable energy projects are not eligible. Biomass and biogas projects may be eligible for Feasibility Study incentives. Visit focusonenergy.com/business/renewables for more information.
- New construction projects are not eligible.
- Other heat sources (such as propane and district steam) do not qualify for gas measures.
- Projects already approved for Focus on Energy funding do not qualify.
- The maximum total for all incentives an individual customer may receive per calendar year is \$400,000.

STEP 4

SUBMIT PROJECT ASSESSMENT INCENTIVE APPLICATION

Approval for this offering is contingent upon receipt of necessary documentation, including the completed application, detailed proposal, and supporting materials for potential energy and energy cost savings estimates.

STEP 5

RECEIVE APPLICATION APPROVAL

Once an application is approved, the Program will notify the customer in writing to confirm their approval and specify next steps.

STEP 6

COMPLETE THE ASSESSMENT

- Complete the assessment by the completion deadline indicated on your application.
- Provide the following required documentation to your Energy Advisor:
 - Final invoice for the assessment.
 - A copy of the detailed assessment report containing the deliverables defined in the proposal.
- Meet with Focus on Energy staff to discuss the assessment findings and identify project potential, available Focus on Energy incentives, and timeline for installation.
- If it is decided the project will not be installed, the customer will be required to provide a written explanation to Focus on Energy.

All items identified above are required before incentive payment will be issued.



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PROJECT ASSESSMENT INCENTIVE APPLICATION

FOR PROJECTS ENROLLED BY 12/31/2022

THIS APPLICATION IS FOR EXISTING FACILITIES ONLY.

SECTION 1

ACCOUNT AND CUSTOMER INFORMATION

TAX IDENTIFICATION NUMBER (Check one.)

If you use a Social Security Number (SSN) as your tax identification number, do not provide it here. You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. You must list an email address in Section 3.

FEIN or SSN _____
FEIN

BUSINESS CLASSIFICATION OF CUSTOMER

(Check one. Required for all businesses, including nonprofits.)

- Sole Proprietorship Individual Single-Member LLC
 C Corporation S Corporation Partnership
 Limited Liability Corporation Classification C, S, P _____
(C = C Corporation, S = S Corporation, P = Partnership)
 Other _____

OWNER NAME (REQUIRED IF SSN IS USED AS TAX IDENTIFICATION NUMBER)

COMPANY NAME

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9)

CITY STATE ZIP

WHO DID YOU WORK WITH FROM FOCUS ON ENERGY ON THIS PROJECT? (CONTACT NAME)

How did you hear about us? (Check one.)

- Community Association/Agency Distributor/Supplier
 Focus Direct Mail/Postcard Focus Email Focus Event
 Focus Staff/Energy Advisor Focus Website Internet Search
 Manufacturer National Rebate Administrator Newspaper
 Past Participation Radio Social Media Trade Ally/Contractor
 Trade Show/Fair TV Utility Bill Insert/Direct Mail
 Utility Contact Utility Email Utility Website
 Word of Mouth - Referral Other: _____

SECTION 2

JOB SITE INFORMATION

(Where the project will occur.)

JOB SITE BUSINESS NAME

PROJECT CONTACT NAME

JOB STREET ADDRESS (PHYSICAL ADDRESS)

CITY STATE ZIP

PROJECT CONTACT PHONE PROJECT CONTACT EMAIL

BUILDING TYPE (FOOD PROCESSING, METAL CASTING, WASTEWATER PLANT, ETC.)

ELECTRIC UTILITY AT JOB SITE ELECTRIC ACCOUNT #

GAS UTILITY AT JOB SITE GAS ACCOUNT #

SECTION 3

TRADE ALLY INFORMATION



TRADE ALLY CONTACT NAME

PRIMARY PHONE # EMAIL

TRADE ALLY COMPANY NAME

ADDRESS

CITY STATE ZIP

SECTION 4

BUSINESS PAYMENT INFORMATION

Make incentive check payable to:

- Customer Trade Ally (complete items B and C)
 Other Payee (Complete items A, B, and C)

Mail check to:

- Customer Address Job Site Address Trade Ally Address
 Other Payee or Alternate Address (complete below)

COMPANY NAME

ADDRESS

CITY STATE ZIP

ATTENTION TO (OPTIONAL)

A. For Other Payee, specify relationship to utility account holder (this is required if check payable to someone other than Customer or Trade Ally):

- Tenant Building Owner Other (specify) _____

B. If a Trade Ally or Other Payee is receiving the incentive payment, provide the Tax Identification Number. To receive payment, a Trade Ally must be registered with a current W-9 on file. Payee is responsible for any associated tax consequences. If you use a Social Security number as the company tax ID (bold) do not provide it here.

TAX IDENTIFICATION NUMBER (Check one.)

- FEIN or SSN _____
FEIN

C. BUSINESS CLASSIFICATION

(Check one. Required for all businesses, including nonprofits.)

- Sole Proprietorship Individual Single-Member LLC
 C Corporation S Corporation Partnership
 Limited Liability Corporation Classification C, S, P _____
(C = C Corporation, S = S Corporation, P = Partnership)
 Other _____

SECTION 5

ASSESSMENT INFORMATION

A) **Potential Energy Cost Savings Estimate** - This estimate is based on information known before the assessment. Indicate the estimated potential savings here and attach information supporting this estimate. \$ _____

B) **Requested Incentive (lesser of 50% of assessment cost, 20% of potential energy cost savings \$15,000 if complete by June 30, 2022, or \$7,500 if complete after June 30, 2022.)** \$ _____

C) **Describe what the project assessment intends to study:**

D) **List the key decision points for moving ahead with the project the study will address:**

E) **If the project(s) found in the assessment are to be implemented, what is the anticipated completion date?** _____

SECTION 6

APPLICATION CHECKLIST

- Detailed assessment proposal.
- Supporting materials for potential energy and energy cost savings estimate.

SECTION 7

CUSTOMER SIGNATURE

I, the Customer, attest I am the ratepayer (utility account holder) for the site(s) listed in Section 2. If applicable, I assign the right to participate in and receive incentives from the Focus on Energy Program to the Other Payee identified in Section 2. I understand the incentive will be capped at 50% of the final project cost, and if the assessment is not completed by June 30, 2022, including submitting all required documentation, the incentive will be limited to \$7,500, whichever is lesser.

**SIGN
HERE**
←

CUSTOMER SIGNATURE

NAME (PRINT)

DATE



Submission Information

MAIL: Focus on Energy
725 W. Park Avenue
Chippewa Falls, WI 54729

EMAIL: business@focusonenergy.com



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PARTICIPATION REQUIREMENTS

NEED HELP? Call 800.762.7077



Before you start your project, make sure you are familiar with participation requirements, program information, and Terms and Conditions.

INFORMATION AND REQUIREMENTS

General Terms and Conditions

Review the Focus on Energy Terms and Conditions at focusonenergy.com/terms or call 800.762.7077 to request a copy.

Incentive Limits

Incentives are limited to \$300,000 per project and \$400,000 per customer per calendar year for all Focus on Energy incentives (prescriptive and custom).

Depending on your business tax classification, you may receive IRS form 1099 for incentives totaling over \$600 in a calendar year.

Trade Ally Information

A Trade Ally represents the company who provided/installed the equipment for a project or performed the service for which a customer is seeking an incentive. Trade Allies who have signed an agreement with Focus on Energy are allowed to enjoy certain program benefits, one of which is to receive direct payment of incentives at the Trade Ally's request. Incentives can only be paid directly to a registered Trade Ally who has a W-9 on file with Focus on Energy. For more information on becoming a registered Trade Ally, visit focusonenergy.com/tradeally.

The Federal Employer Identification Number (FEIN) and Business Classification of the Trade Ally is required IF you received your incentive as a credit on your invoice, whereby the incentive is paid directly to the Trade Ally. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due.

If your project was completed by more than one Trade Ally (example, equipment was purchased from one Trade Ally but installed by another Trade Ally) and the incentive is being paid to you the customer, enter the information of the Trade Ally who installed your equipment in Section 3: Trade Ally Information. If the equipment was self-installed, enter the information of the Trade Ally from whom you purchased the equipment.

Assignment of Incentives to Other Payee

The Customer for the project site listed on the application may assign their right to participate and receive incentives to Other Payee. The Customer must sign Section 7 and identify the Other Payee in Section 2.

REDUCING ENERGY WASTE ACROSS WISCONSIN

Focus on Energy, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment. Focus on Energy information, resources, and financial incentives help to implement energy efficiency and renewable energy projects that otherwise would not be completed.

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