



**focus on energy**®

Partnering with Wisconsin utilities

**2019**

**BUSINESS PROGRAMS**



**PROJECT ASSESSMENT  
INCENTIVE APPLICATION**

## SECTION 1

## INCENTIVE INFORMATION

The Project Assessment Incentive is designed to share a customer's investment in the external costs of studying and developing an energy saving project that will result in enough information to make a sound decision whether to implement the project(s). This incentive requires pre-approval from Focus on Energy prior to initiating the assessment. This application expires on December 31, 2019. Please visit [focusenergy.com/custom](http://focusenergy.com/custom) to ensure you have the most current form. Questions: Call 800.762.7077.

## SECTION 2

## APPLICATION REQUIREMENTS

- This incentive is only available for the study and development of complex custom project(s) that increase energy efficiency and will result in an eligible custom incentive project and are not eligible for prescriptive projects. Renewable energy projects are not eligible. Approval of Project Assessment Incentives is at the Program's discretion.
- This incentive is available for qualifying AgSG and LEU customers only.
- Focus on Energy will pay 50% of the cost of an assessment, up to \$7,500.
- You MUST receive pre-approval from Focus on Energy prior to beginning the assessment.** Please submit this application for pre-approval along with any backup documentation and the study proposal.
- The Project Assessment Incentive can be no larger than 20% of the first-cut estimate of the initial annual energy savings potential based on information available prior to the assessment (See Section 7).
- An Assessment proposal is required with this application that describes in detail what will be performed as part of the assessment.
- The intent of the Project Assessment Incentive is to result in a report providing enough information for the customer to make a sound project decision including project installation quotes, investment-grade energy savings estimates, estimates of other benefits, and appropriate documentation of calculations.
- Focus on Energy only offers incentives for customers of qualifying electric and natural gas providers. Other heat sources (such as propane and district steam) do not qualify for gas measures. Utility account information for the project site and payment information, including Federal Tax ID, is required. Focus on Energy cannot provide incentive agreements without this information.
- The maximum total for all incentives an individual customer may receive per calendar year is \$500,000.

## SECTION 3

## CUSTOMER LEGAL INFORMATION

## TAX IDENTIFICATION NUMBER (Check one.)

FEIN **or**  SSN \_\_\_\_\_  
FEIN OR SOCIAL SECURITY NUMBER

## BUSINESS CLASSIFICATION OF CUSTOMER

(Check one. Required for all businesses, including non-profits.)

- 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

How did you hear about us? (Check all that apply.)

- Utility  Trade Ally  Energy Advisor  Internet  E-mail  
 Trade Show/Event  Direct Mail  Other: \_\_\_\_\_

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

# 2019 PROJECT ASSESSMENT INCENTIVE APPLICATION

THIS APPLICATION IS FOR EXISTING FACILITIES ONLY. FOR AN ELECTRONIC COPY OF THIS FORM VISIT [FOCUSONENERGY.COM/CUSTOM](http://FOCUSONENERGY.COM/CUSTOM).

## SECTION 4

## TRADE ALLY INFORMATION



TRADE ALLY CONTACT NAME

PRIMARY PHONE # E-MAIL ADDRESS

TRADE ALLY COMPANY NAME

ADDRESS

CITY STATE ZIP

## SECTION 5

## BUSINESS PAYMENT INFORMATION

Make incentive check payable to:

- Customer  Trade Ally  Other Payee

For Other Payee, please specify relationship to utility account holder:

- Tenant  Building Owner  Other (specify) \_\_\_\_\_

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. Payee is responsible for any associated tax consequences.

## TAX IDENTIFICATION NUMBER (Check one.)

FEIN **or**  SSN \_\_\_\_\_  
FEIN OR SOCIAL SECURITY NUMBER

## BUSINESS CLASSIFICATION OF OTHER PAYEE

(Check one. Required for all businesses, including non-profits.)

- 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 \_\_\_\_\_

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)



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SECTION 6

JOB SITE INFORMATION (Where the project will occur)

JOB SITE BUSINESS NAME PROJECT CONTACT NAME
JOB SITE STREET ADDRESS (PHYSICAL ADDRESS) CITY STATE ZIP
PROJECT CONTACT PHONE PROJECT CONTACT E-MAIL BUILDING TYPE (FOOD PROCESSING, METAL CASTING, WASTEWATER PLANT ETC.)
ELECTRIC UTILITY AT JOB SITE ELECTRIC ACCOUNT #
GAS UTILITY AT JOB SITE GAS ACCOUNT #

SECTION 7

ASSESSMENT INFORMATION

A) Potential Energy Cost Savings Estimate - This estimate is based on information known before the assessment. An energy assessment is considered when significant potential savings are believed to be available, but the customer is uncertain of the specific application. Indicate the estimated potential savings here and attach the information that supports this estimate. \$ \_\_\_\_\_

B) Requested Incentive (lesser of 50% of assessment cost or \$7,500.) \$ \_\_\_\_\_ A divided by B = \_\_\_\_\_ (Must be greater than 5)

C) Describe what the project assessment intends to study:

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

SECTION 8

APPLICATION CHECKLIST

Please check the boxes below if your answer is yes.

- Is the detailed assessment proposal attached to this application?
Are supporting materials for potential energy and energy cost savings estimate attached?
Once the Assessment Report is completed, the customer will meet with Focus on Energy staff to discuss whether the project will be installed, potential Focus on Energy project incentives, and a timeline for project installation. If it is decided that the project will not be installed, the customer will provide a written explanation to Focus on Energy.
If the project(s) found in the assessment is to be implemented, what is the anticipated completion date? \_\_\_\_\_

SECTION 9

CUSTOMER SIGNATURE

Certification: The following certifications are required in order for this form to substitute for the IRS form W-9. Under penalty of perjury, I certify that:

- The number shown on this form is the correct taxpayer identification number.
I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.
I am a U.S. citizen (includes a U.S. resident alien).

I have read and agree to the provisions set forth herein and to the Terms and Conditions posted at focusonenergy.com/terms. I understand that Focus on Energy may revise these Terms and Conditions at any time and I will not be notified in the event changes are made. To the best of my knowledge, the statements made on this application are complete, true and correct, and I have submitted the appropriate supporting documentation to receive an incentive. The Internal Revenue Service does not require my consent to any provision of this document other than the certifications required to avoid backup withholding.

If Other Payee is indicated in Section 5, I, the Customer, attest I am the ratepayer (utility account holder) for the site(s) listed in Section 2 and I assign the right to participate in and receive incentives from the Focus on Energy Program to the Other Payee identified in Section 5.

CUSTOMER SIGNATURE NAME (PRINT) DATE



Please select the program for which you are applying (check one):

- Agriculture, Schools and Government Program AgSGapps@focusonenergy.com
Large Energy Users Program LEUapps@focusonenergy.com



Please see the Participation Requirements and Submittal Information on the next page for mailing addresses and fax numbers.

# PARTICIPATION REQUIREMENTS AND SUBMITTAL INFORMATION

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

## SAVING ENERGY AND MONEY FOR WISCONSIN

For more information,  
call 800.762.7077

or visit [focusonenergy.com](http://focusonenergy.com)

### INFORMATION AND REQUIREMENTS

#### General Terms and Conditions

Review the FOCUS ON ENERGY® Terms and Conditions at [focusonenergy.com/terms](http://focusonenergy.com/terms) or call 800.762.7077 to request a copy.

#### Incentive Limits

Incentives are limited to \$500,000 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.

#### 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 a Third Party. The Customer must sign Section 9 and identify the Other Payee in Section 5.

#### 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](http://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 4: Trade Ally Information. If the equipment was self-installed, enter the information of the Trade Ally from whom you purchased the equipment.

#### Focus on Energy Information

Focus on Energy works with eligible Wisconsin residents and businesses to install cost-effective energy efficiency and renewable energy projects. Focus on Energy information, resources and financial incentives help to implement projects that otherwise would not get completed, or to complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, promote in-state economic development, protect our environment and control the state's growing demand for electricity and natural gas.

### INCENTIVES FOR BUSINESSES

#### AGRICULTURE, SCHOOLS AND GOVERNMENT (AgSG) PROGRAM

Qualifying customers are agriculture producers, school facilities and governments.

Typical facility types include:

- Agriculture producers - e.g. dairy farms, livestock, greenhouses, crop farming, aquacare
- School facilities - e.g. public and private K-12, churches if associated with a school, technical colleges, small colleges and universities
- Government - e.g. federal/state, municipal/county, small wastewater treatment, tribes

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

**FAX:** 608.663.0267

**E-MAIL:** [AgSGapps@focusonenergy.com](mailto:AgSGapps@focusonenergy.com)

#### LARGE ENERGY USERS (LEU) PROGRAM

Qualifying customers have incurred monthly energy demand of at least 1,000 kW of electricity or 100,000 Therms of natural gas at least once in the last 12 months and were billed at least \$60,000 by their energy utility.

Typical facility types include:

- Large industrial facilities - e.g. paper mills, food processors, foundries
- Large healthcare - e.g. large hospitals, large healthcare systems including VA hospitals
- School and government facilities - e.g. UW universities, large private universities, Fort McCoy
- Large publicly-owned wastewater treatment plants - e.g. Milwaukee Metropolitan Sewerage District

**MAIL:** Focus on Energy AgSG  
440 Science Drive, Suite 203  
Madison, WI 53711

**FAX:** 608.819.9051

**E-MAIL:** [LEUapps@focusonenergy.com](mailto:LEUapps@focusonenergy.com)



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