

## 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, 2018. Please visit [focusonenergy.com/custom](http://focusonenergy.com/custom) to ensure that 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 project(s) that increase energy efficiency. Approval of Project Assessment Incentives is at the Program's discretion. For Business Incentive Programs and Agriculture, Schools and Government, 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.
- 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 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 project report that provides enough information for the customer to make a sound project decision and needs to include 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 \$400,000 for AgSG, BIP and LEU customers.

## SECTION 3: TRADE ALLY INFORMATION

Trade Ally Business Name:		Trade Ally Contact Person:	
Phone:	Fax:	E-mail:	

## SECTION 4: CUSTOMER LEGAL INFORMATION

Company Legal Name:	Tax Identification Number (complete ONE only, must be 9 digits): FEIN #: _____ - _____ OR SSN: _____ - _____ - _____		
Company Contact Name:	Business Classification of Customer (Check ONE only. Required for all businesses, including non-profits): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship-Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other _____		
Street Address:	City:	State:	Zip Code:
Owner Name (Corporations Excluded):	Phone:	Fax:	E-mail:

## SECTION 5: PAYMENT INFORMATION (All information is required to receive payment)

Make Incentive Check Payable to (check ONE):  Company Name  Business Owner's Legal Name (Only if Sole Proprietor)  Trade Ally  
(In order to pay Trade Allies, invoice must have "Focus on Energy" incentive clearly indicated and deducted from customer's amount due and Trade Ally must provide their Federal Tax ID)

Make Check to the Attention of:

Alternate Mailing Address (if different from address above):	City:	State:	Zip Code:
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## SECTION 6: APPLICATION SUBMITTAL

Select the program for which you are applying: (check **ONE** only). Mail, fax, or email your application and supporting documents. Program descriptions and contact information are listed in Step 3 on the application checklist.

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|--|---|
| <input type="checkbox"/> <b>Large Energy Users Program</b><br>E-mail: <a href="mailto:LEUapps@focusonenergy.com">LEUapps@focusonenergy.com</a> | <input type="checkbox"/> <b>Agriculture, Schools and Government</b><br>E-mail: <a href="mailto:AgSGapps@focusonenergy.com">AgSGapps@focusonenergy.com</a> |
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### How did you hear about this Focus on Energy incentive?

- Utility  Trade Ally  Energy Advisor  Website  Event  Advertisement/Mailing  Word of Mouth  Other: \_\_\_\_\_

**SECTION 6: JOB SITE INFORMATION** (Where project will occur)

Job Site Name:		Project Contact Name:		
Job Site Street Address (physical address):		City:	State: <b>WI</b>	Zip Code:
Project Contact Phone:	Project Contact Fax:	Project Contact E-mail:	Preferred Means of communication: <input type="checkbox"/> Phone <input type="checkbox"/> Fax <input type="checkbox"/> Mail <input type="checkbox"/> E-mail	
Electric Provider at Job Site:		Electric Provider Primary Acct #:		
Natural Gas Provider at Job Site:		Natural Gas Provider Primary Acct #:		
Building Type (Check ONE): <input type="checkbox"/> Food Processing <input type="checkbox"/> Metal Casting <input type="checkbox"/> Plastics <input type="checkbox"/> Pulp & Paper <input type="checkbox"/> Warehouse (attached to plant) <input type="checkbox"/> Education <input type="checkbox"/> Healthcare				
<input type="checkbox"/> Water/Wastewater <input type="checkbox"/> Other _____				

**SECTION 7: ASSESSMENT INFORMATION**

<b>A) Potential Energy Cost Savings Estimate</b> 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>B) Requested Incentive (lesser of 50% of assessment cost or \$7,500.)</b>	\$
<b>A divided by B =</b>	(Must be greater than 5)

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

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

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**E) Customer Internal Requirements for Implementing the Assessed Project(s):**

Simple payback of \_\_\_\_ years      ROI of \_\_\_\_ %      Lifecycle cost savings of \_\_\_\_ %      Other (describe): \_\_\_\_\_

**SECTION 8: APPLICATION CHECKLIST**

Is the detailed assessment proposal attached to this application?	<input type="checkbox"/> Yes
Are supporting materials for potential savings estimate attached?	<input type="checkbox"/> Yes
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.	<input type="checkbox"/> Yes
If the project(s) found in the assessment is to be implemented, what is the anticipated completion date?	Date: _____

**SECTION 9: CUSTOMER SIGNATURE** (Read and Sign)

I, the undersigned, certify that the application information provided on this page and the attached pages are accurate and true to the best of our knowledge and that we have read and understood the requirements of this application. I understand that submission of this form does not guarantee we will receive funding or a specific level of funding. I acknowledge that participation in this program shall impose no liability on Focus on Energy. Focus on Energy may conduct a pre- and/or post-service inspection to verify savings.

Customer Signature:	Customer Name (Print):	Date:
Internal Use Only	Approving Program Manager:	Date:

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 be 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 help manage the state's growing demand for electricity and natural gas.