

PROJECT DEVELOPMENT INCENTIVE FOR TRIBAL NATIONS

The FOCUS ON ENERGY® Project Development Incentive (PDI) offsets the cost of a feasibility study for energy efficiency or renewable energy project(s) completed by a tribal nation-owned entity. By participating in the PDI, tribal nations are equipped with the information needed to move a project forward.

UNDERSTANDING PROJECT DEVELOPMENT INCENTIVES

Focus on Energy will provide participants up to \$15,000 in financial incentives, not to exceed 75% of the study costs if completed by June 30, 2022. Studies conducted after July 1, 2022, are eligible for up to \$10,000 in financial incentives, not to exceed 75% of the study costs. Studies must be completed and all required paperwork must be submitted no later than December 10, 2022. Approval for the PDI is not guaranteed.

STEP 1

BEFORE YOU APPLY

Approval from Focus on Energy is required prior to beginning the study.

- 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, visit focusonenergy.com/EA-map or call 800.762.7077 for assistance.

New construction projects do not qualify.

STEP 2

WHAT YOU'LL NEED

- Project Development 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.
 - Statement on project feasibility.
 - Energy savings estimates and supporting calculations.
 - Project cost estimates.
 - Any data collected and used in the study.

STEP 3

SUBMIT PROJECT DEVELOPMENT 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 4

RECEIVE APPLICATION APPROVAL

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

STEP 5

COMPLETE THE STUDY

- Complete the study by the deadline indicated on your application. Studies must be complete and all required paperwork must be submitted no later than December 10, 2022.
 - A detailed report of the study containing the deliverables defined in the proposal will be required prior to payment of the incentive.
- Provide the following required documentation to your Energy Advisor:
 - Final invoice for the study.
 - A copy of the detailed report containing the deliverables defined in the proposal.
- Meet with Focus on Energy staff to discuss the findings and identify project potential, available Focus on Energy incentives, and timeline for installation.
- **All items identified above are required before incentive payment will be issued.**



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PROJECT DEVELOPMENT INCENTIVE APPLICATION

SECTION 3

CUSTOMER CONTACT INFORMATION

JOB SITE CUSTOMER CONTACT NAME _____

PRIMARY PHONE # _____ E-MAIL ADDRESS _____

I opt in to receive program updates via text message.

Preferred method of contact: Call E-mail Text

If Focus on Energy has a question about this application, we should contact:

Customer Trade Ally Other _____

SECTION 1

ACCOUNT AND CUSTOMER INFORMATION

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your tax identification number, **do not provide it below.** 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 _____

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 # _____

PROPANE SUPPLIER AT JOB SITE _____

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 (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. Payee is responsible for any associated tax consequences.

TAX IDENTIFICATION NUMBER (Check one.)

- FEIN or SSN _____
- FEIN OR SOCIAL SECURITY NUMBER

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

STUDY INFORMATION

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

B) Requested Incentive (lesser of 75% of study cost or \$15,000 (if complete by June 30, 2022) OR \$10,000 (if complete by December 10, 2022)) \$ _____

C) Describe the intended project(s) of the study:

[Empty box for describing the intended project(s) of the study]

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

[Empty box for listing key decision points for moving ahead with the project]

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

SECTION 6

APPLICATION CHECKLIST

- Detailed study 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 if the feasibility study detailed above does not complete by 6/30/22, including submitting all required documentation, the incentive will be capped at \$10,000.



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 focusenergy.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 focusenergy.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 5.

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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