2023 BUSINESS OFFERINGS

NONPROFIT EFFICIENCY ACCELERATOR GUIDE

focus on energy®
Partnering with Wisconsin utilities

OVERVIEW

NEED HELP? CALL 800.762.7077

FOCUS ON ENERGY® knows the unique challenges your nonprofit faces when planning for the future. When all of your efforts are directed at helping your community, it can be difficult to justify investing in your own operations. Focus on Energy's Nonprofit Efficiency Accelerator (NEA) Offering can close the funding gap to help your organization plan and complete energy-saving projects sooner, allowing you to focus on serving your community.

Customer Eligibility

- Project site must be served by a participating electric or natural gas utility for the fuel(s) being saved. For a complete list of participating utilities, visit **focusonenergy.com/utilities**.
- Applicants must be a 501(c)(3) organization, verified by a current W-9 and/or the IRS Tax Exempt Organization Database **(irs.gov/charities-and-nonprofits)**.
- Multifamily, agriculture, schools, and government customers are ineligible for the NEA. For current opportunities available to these business types, visit **focusonenergy.com/business**.

Paths to Participation

The NEA Offering has two paths to participation: the Nonprofit Efficiency Accelerator Donation Match (NEA DM) and the Nonprofit Efficiency Accelerator Request for Proposals (NEA RFP). Use the table below to determine the best path to participation for your organization.

	DONATION MATCH	REQUEST FOR PROPOSALS
BASIC DESCRIPTION	In addition to standard incentives, Focus on Energy will provide a 100% match to your organization's fundraising efforts, paid upon project completion.	Provide a proposal to Focus on Energy for your request above standard incentives. Proposals are awarded to feasible projects completing within the time frame.
INCENTIVE LIMITS	Up to $50,000 per project, total of standard incentive plus donation match.	❍ $100,000 for projects requesting up to 75% of project cost. ❍ $300,000 for projects requesting up to 50% of project cost. ❍ Maximum incentive of 15 times annual energy cost savings.
APPLICATION TIME FRAME	Approved by June 30, 2024, fundraising period complete by December 31, 2024, and project completed by December 31, 2025.	Approved by December 31, 2024, and completed by December 31, 2025.
APPLY USING	This form.	NEA RFP Application, found at **focusonenergy.com/about/rfp.**

DONATION MATCH OVERVIEW

step 1
IDENTIFY YOUR PROJECT

- Projects may include improvements to the facility's lighting, HVAC, commercial refrigeration, building envelope, and process improvements.
- Eligible projects must save electricity and/or natural gas.
- Independent of the NEA Offering, the project must meet qualification requirements of a custom or prescriptive incentive. The custom payback requirements are waived for NEA projects. For information on current incentives, visit **focusonenergy.com/catalogs**.
- Solar Photovoltaic (PV) and Retrocommissioning (RCx) projects are ineligible for the NEA Offering.
- The resources below are available for assistance identifying energy-saving measures:
  - Focus on Energy's Business Energy Portal, by visiting **focusonenergy.focus-assessments.com**.
  - ENERGY STAR® has a number of resources at **energystar.gov/buildings/tools-and-resources**.
  - Connect with a Focus on Energy Advisor by calling **800.762.7077** or visiting **focusonenergy.com/ea-map**.

step 2
QUANTIFY FINANCIAL NEED

- Work with a Trade Ally or vendor to obtain a proposal for the project. The proposal or quote should contain costs for equipment, labor, tax, and fees. Volunteer labor and donated equipment should be excluded from total project cost.
- Provide the information to your Focus on Energy Advisor, who will determine the base project incentive.
- Determine cash-on-hand or funds immediately available to support the project.
- Complete Section 7 to identify funding gap. Focus on Energy will match funds 100% until funding gap is satisfied.
- An Enrollment Letter will be issued by the Energy Advisor confirming funding commitment.
- **Did you know?** Your Registered Trade Ally can accept incentive payments on your behalf and provide services at a reduced upfront cost to you.

step 3
BEGIN FUNDRAISING PERIOD

- The fundraising period begins upon receiving an Enrollment Letter from Focus on Energy. The initial fundraising period is set to three months from enrollment.
- Fundraising can include general donations from the public including fundraising events.
- A ledger of funds received during the fundraising period is required and should include:
  - Date of donation or reconciled date.
  - Amount of donation.
  - Means of donation such as fundraising event or general collection.
  - **Do not provide donor names or other personal information.**
- The fundraising period ends once the funding gap funds have been raised or after three months. If sufficient funds have not been raised to fund the project, a three month extension will be granted to projects who have raised at least 50% of funding gap.

step 4
INSTALL YOUR PROJECT

- Work with your organization, Trade Ally, or other vendors to complete the project as proposed.
- Contact your Energy Advisor as soon as possible if project parameters such as timeline, equipment, or project cost have changed.
- Notify your Energy Advisor within 60 days of completing the installation to receive your incentive check. Your incentive check will contain the base incentive and donation match incentive.

step 5
COMMUNICATE SUCCESS

- Work with your Energy Advisor to promote the success of your project to your organization.
- Your project can be featured across Focus on Energy's social media accounts.

RESET FORM

NEA DONATION MATCH ENROLLMENT

Please complete all sections. Incomplete forms will delay approval.

focus on energy®
Partnering with Wisconsin utilities

section 1
ACCOUNT AND CUSTOMER INFORMATION

Tax Identification Number (Check one. If you use a Social Security number 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's not already on file. **You must list an email address in Section 3**.)

❑ FEIN **or** ❑ SSN ______________________

Business Classification of Customer

❑ I confirm I am a representative of a 501(c)(3) organization.

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)

section 2
JOB SITE INFORMATION

(Refer to your utility bills for account numbers below.)

JOB SITE BUSINESS NAME

ELECTRIC UTILITY AT JOB SITE ELECTRIC ACCOUNT #

GAS UTILITY AT JOB SITE GAS ACCOUNT #

❑ Job Site Address is same as Legal Address.
❑ Job Site Address is different (complete below).

JOB SITE ADDRESS

CITY STATE ZIP

section 3
CUSTOMER CONTACT INFORMATION

JOB SITE CUSTOMER CONTACT NAME

PRIMARY PHONE # EMAIL ADDRESS

❑ I opt in to receive program updates via text message.

Preferred method of contact: ❑ Call ❑ Email ❑ Text

If Focus on Energy has a question about this application, we should contact:
❑ Customer ❑ Trade Ally ❑ Other ______________________

section 4
TRADE ALLY INFORMATION (OPTIONAL)

TRADE ALLY CONTACT NAME

PRIMARY PHONE # EMAIL ADDRESS

TRADE ALLY COMPANY NAME

ADDRESS

CITY STATE ZIP

section 5
BUSINESS PAYMENT INFORMATION

Make incentive check payable to:

❑ Customer ❑ Trade Ally (complete item A) ❑ Other Payee (complete item B)

Payee is responsible for any associated tax consequences.

Mail check to: ❑ Customer Address ❑ Job Site Address

❑ Trade Ally Address ❑ Alternate Address or Other Payee (complete below)

COMPANY NAME

ADDRESS

CITY STATE ZIP

ATTENTION TO (OPTIONAL)

A. For Trade Ally Payee
To receive payment, a Trade Ally must be registered with a current W-9 on file. Provide the Trade Ally's Tax Identification Number. If you use a Social Security number as the company tax ID, **do not provide it here**.

FEIN

B. For Other Payee

1. Individual Contact Information:

NAME EMAIL ADDRESS

2. Specify relationship to utility account holder (this is required if check is payable to someone other than the Customer or Trade Ally):
   ❑ Tenant ❑ Building Owner ❑ Other (specify) ______________
3. Select your business classification. (Check one. Required for all businesses, including non-profits.)

❑ Sole Proprietorship ❑ Individual ❑ Single-Member LLC
❑ C Corporation ❑ S Corporation ❑ Partnership
❑ LLC - C Corp ❑ LLC - S Corp ❑ LLC - Partnership
❑ Other ______________________

4. A representative of Focus on Energy will reach out to you via email with a method to securely provide a copy of your W-9. This is required to receive payment. Provide the email address (if different than the one provided above):

section 6
BUSINESS PROPERTY TYPE

Select one (1) property type that best describes your business:

- ❑ Agriculture Producer
  - ❑ Dairy - Traditional
  - ❑ Dairy - Robotic
  - ❑ Other: ______________________
- ❑ Education
- ❑ Financial Institution
- ❑ Government
- ❑ Grocery/Convenience Store
- ❑ Health Services
- ❑ Hotels & Lodging
- ❑ Information, Technical & Scientific Services
- ❑ Manufacturing (product): ______________________
- ❑ Office
- ❑ Religious & Spiritual Organization
  - ❑ With K+ Daily Education
  - ❑ Without K+ Daily Education
- ❑ Restaurant
- ❑ Retail
- ❑ Vehicle Sales/Service
- ❑ Water/Wastewater
- ❑ Other: ______________________

section 7
IDENTIFY FUNDING GAP

	PROJECT INFORMATION	EXAMPLE
PROJECT NAME		*Community Hall LED Upgrade*
PROJECT COST (A)		*$20,000.00*
BASE INCENTIVE (B)		*$1,500.00*
CUSTOMER AVAILABLE FUNDS (C)		*$4,500.00*
FUNDING GAP (D) (A - B - C)		*$14,000.00*
MAXIMUM DONATION MATCH (50% X D)		*$7,000.00*

section 8
CUSTOMER SIGNATURE

I, the Customer, attest that 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 5.

SIGN HERE ←

____
CUSTOMER SIGNATURE

____
NAME (PRINT)

____
DATE

Submit applications and supporting documentation to:

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

EMAIL: business@focusonenergy.com

PARTICIPATION REQUIREMENTS

NEED HELP? **Call 800.762.7077**

Before you start your project, please 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.

ABOUT FOCUS ON ENERGY

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.

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.

focus on energy®
Partnering with Wisconsin utilities