

2024 BUSINESS OFFERINGS

PROJECT ASSESSMENT INCENTIVE GUIDE



INTRODUCTION & ELIGIBILITY



The FOCUS ON ENERGY® Project Assessment Incentive (PAI) is designed to share a customer's investment in the external costs of uncovering or studying and developing an energy savings project (including biogas and biomass technologies). 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.

PROJECT ASSESSMENT INCENTIVES

The PAI provides an opportunity for commercial, industrial, school, government, agricultural, and water/wastewater facilities to receive financial incentives for the identification and development of complex custom project(s). The study is intended to result in an eligible energy efficiency or renewable energy custom incentive project (see **Biogas and Biomass Project Assessment Incentives** for additional details specific to those technologies). Customers completing assessments by December 31, 2024, may request up to \$15,000. The PAI is capped at 50% of the study cost or 20% of the estimated annual energy cost savings*.

Approval of the PAI in writing is required prior to initiating the assessment, including execution of a contract. Approval of the PAI is not guaranteed.

Recommendations from an accepted PAI may be eligible for standard or renewable custom incentives, depending on the proposed technology. Visit focusonenergy.com/business/custom-incentives for more information.

**20% of estimated annual energy cost savings cap does not apply to biogas or biomass projects.*

BIOGAS AND BIOMASS PROJECT ASSESSMENT INCENTIVES

A facility must meet one of the following criteria to qualify for a PAI:

- Facility has opportunities to install a new biogas or biomass system.
- Facility is not producing or utilizing biogas or biomass to the full capability or design capacity of an existing system.

A phased study on the same system will not be eligible for incentive payment until all phases of the study are complete.

“Walk through” surveys not yielding engineering estimates of renewable energy production and a detailed outline of project costs (design, materials, etc.) are not eligible for funding. Independently submitted contractor and/or consultant cost proposals are also not eligible.

Assessments exclusively evaluating one of the end uses specified below **do not qualify** for a PAI:

- Production of pipeline-quality renewable natural gas (RNG) for injection into an interstate or intrastate natural gas transport or distribution pipeline system with no use of the RNG within the service area of a Focus on Energy participating utility.
- Production of compressed natural gas (CNG) for use as vehicle fuel.
- Other uses not resulting in an offset of electricity and/or natural gas currently purchased (or would be purchased in the future) to meet energy needs of the Focus on Energy customer from a Focus on Energy participating utility.

HOW TO APPLY

NEED HELP? CALL 800.762.7077

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:
 - Description of what the study will assess and why.
 - The work to be performed.
 - A list of deliverables for the final report, including:
 - Summary of findings, including statements on barriers and project feasibility.
 - Energy and cost savings estimates and supporting calculations and materials.
 - Project cost estimates.
 - Plan for implementation should the study result in a custom project.
 - Any data collected and used in the assessment.
 - Experience and qualifications of the feasibility study provider for biogas and biomass projects.

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.
- The incentive cannot exceed 20% of the estimated annual energy cost savings based on the best available data prior to the assessment (excluding biogas and biomass projects). Preliminary savings estimates are subject to review prior to pre-approval.
- Approval from Focus on Energy is required prior to beginning the assessment.
- New construction projects are not eligible.
- Prescriptive measures 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, executive summary, and supporting materials for potential energy and energy cost savings estimates.

step 5

RECEIVE APPLICATION APPROVAL

Once your application is approved, the Program will notify you in writing to confirm 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 final report containing the deliverables defined in the proposal. For **biogas and biomass projects**, see **Appendix A** for **Final Assessment Report Guidelines**.
- Focus on Energy reserves the right to visit the potential project site to verify reported information.
- Meet with a Focus on Energy representative to discuss assessment findings, potential projects, and available Focus on Energy incentives.
- If the customer decides not to move forward with any projects after the assessment, customer must provide a written explanation to Focus on Energy explaining why.

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

PROJECT ASSESSMENT INCENTIVE APPLICATION

FOR PROJECTS ENROLLED BY 12/31/2024



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

TAX CLASSIFICATION OF CUSTOMER

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

- ☐ Sole Proprietorship ☐ S Corporation ☐ Partnership
☐ C Corporation ☐ LLC - S Corp ☐ LLC - Partnership
☐ LLC - C Corp ☐ Single-Member LLC
☐ 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? (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

TRADE ALLY CONTACT NAME

PRIMARY PHONE # EMAIL ADDRESS

TRADE ALLY COMPANY NAME

ADDRESS

CITY STATE ZIP

section 5

BUSINESS PAYMENT INFORMATION

Payee is responsible for any associated tax consequences.

Make incentive check payable to:

☐ Customer ☐ Trade Ally ☐ Other Payee

If Other Payee is selected, the relationship to the utility account holder must be identified below:

☐ Tenant ☐ Building Owner ☐ Other (specify) _____

For All Payees

Mail check to: ☐ Customer Legal Address ☐ Job Site Address
☐ Trade Ally Address ☐ Alternate Address

COMPANY NAME

ADDRESS

CITY STATE ZIP

ATTENTION TO (OPTIONAL)

For Trade Ally and Other Payees

Trade Allies must be registered with the Program and have a current W-9 on file to receive payment.

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 below.

FEIN

Tax Classification of Payee

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

- ☐ Sole Proprietorship ☐ S Corporation ☐ Partnership
☐ C Corporation ☐ LLC - S Corp ☐ LLC - Partnership
☐ LLC - C Corp ☐ Single-Member LLC
☐ Other _____

Payee Contact Information

NAME

EMAIL ADDRESS

section 6 TECHNOLOGY

☐ Anaerobic Digester ☐ Anaerobic Pretreatment ☐ Biomass ☐ Other _____

section 7 ASSESSMENT INFORMATION

A) Potential Annual 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* or \$15,000) \$ _____
**Does not apply to biogas or biomass projects.*

C) What is the anticipated completion date of the assessment? _____

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

section 8 APPLICATION CHECKLIST

☐ Proposal. ☐ Supporting materials for estimated energy and energy cost savings.

section 9 CUSTOMER SIGNATURE

I, the undersigned Customer, agree the stated energy efficiency measure(s) was (were) installed at the job site address listed above as part of the Focus on Energy Program. I have read and agreed to the provisions set forth herein and to the Terms and Conditions posted at focusonenergy.com/terms. I understand 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.

If the Customer is identified as the Payee in Section 5, the following certifications are required for this form to substitute for the Internal Revenue Service (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 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. person.

The IRS does not require my consent to any provision of this document other than the certifications required to avoid backup withholding.



CUSTOMER SIGNATURE _____

NAME (PRINT) _____

DATE _____

Submit applications and supporting documentation to:

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

E-MAIL: 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 the business tax classification of the payee, the entity receiving the incentive payment 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 Tax Classification of the Trade Ally is required IF 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 on the Customer's invoice.

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.

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 9 and identify the Other Payee in Section 5.

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.

APPENDIX A: FINAL ASSESSMENT REPORT GUIDELINES (BIOGAS AND BIOMASS PROJECTS ONLY)

Assessment reports must comply with the guidelines below before the Project Assessment Incentive will be paid.

A. Cover Page

- a. Title: "Focus on Energy – Biogas (or Biomass) Assessment."
- b. Customer name.
- c. Facility name and address.
- d. Type of business (processing plant, wastewater treatment facility, etc.).
- e. System being studied (anaerobic pretreatment system, biomass, etc.).
- f. Name of consulting firm/engineer and contact information.
- g. Report date.

B. Executive Summary

- a. A description of the project and its major components.
- b. Projected reduction in kW, kWh, and/or therms, and annual total cost savings.
- c. Simple payback period based on the estimated installation cost and annual energy cost savings.

C. Study Results and Recommendations

- a. Detailed project scope.
 - i. Preliminary design specifications and operating parameters for major equipment components of the system (including schematics, process diagrams, control strategies, etc.).
 - ii. For biogas, detailed description of how the biogas will be measured and treated prior to beneficial utilization.
 - iii. Cost estimate to purchase and install suggested measures, including design services and system commissioning.
- b. Energy usage and savings analysis.
 - i. New system(s).
 1. Current baseline energy usage offset by the potential biogas- or biomass-derived energy, including at least the last 12 months of normal and peak energy use data.
 2. Calculations for estimated annual energy production and utilization (kWh, kW, and therms). See **Appendix B** for a list of considerations for this analysis.
 - ii. Existing system(s).
 1. Current (baseline) biogas/biomass volumes and associated energy output supported by acceptable measurement data.
 2. Calculations for estimated increase in annual energy production and utilization (kWh, kW, and therms). See **Appendix B** for a list of considerations for this analysis.
 - iii. Simple payback calculation for each of the proposed measures.
 - iv. Description of methodology to verify and quantify the magnitude of renewable energy production post-installation.

APPENDIX B: SAVINGS ANALYSIS

- A generic description may be used for a series of similar spreadsheets if sufficient explanatory notes are included on each spreadsheet.
- Each analysis must have adequate information for the review engineer to confidently concur with the energy production values.
- Spreadsheets must include a description of the calculations and show the formulas used.
- Calculation assumptions and input variables (with associated units) must be clearly stated and justified.
- All associated parasitic energy uses must be presented and accounted for.
- Demand savings (kW) and energy consumption (kWh) must be calculated separately (if applicable).
- Calculations claiming demand savings must demonstrate the extent to which the proposed equipment contributes to the peak demand.
- The cost(s) in the calculation must match the customer's utility bill. Energy costs for electric savings should use a blended rate (total kWh used divided by total electric charges) to account for kW related savings (if applicable).
- Buy-back rates from the utility must be clearly stated (if applicable).
- Energy savings should be normalized for weather. Weather data used should be "bin-type" values compiled over multiple years and the data source used must be accessible for engineers during the review process.
- Analyses based solely on manufacturer's claims may not be accepted until independently verified.

**For more information,
call 800.762.7077
or visit focusonenergy.com**

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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