

2024 BUSINESS OFFERINGS

HIGHER EDUCATION STRATEGIC ENERGY MANAGEMENT



HOW TO APPLY

NEED HELP? Call 800.762.7077



FOCUS ON ENERGY® Higher Education Strategic Energy Management (SEM) provides technical support and financial incentives for higher education institutions interested in moving beyond project-by-project energy savings. The objective is to advance energy-management capabilities and establish a continuous energy-management improvement process resulting in low- and no-cost operational energy improvements. This offering is most impactful for organizations with a continuous improvement culture, an established Energy Team, and an annual strategic plan for energy management.

UNDERSTANDING SEM

SEM is a long-term approach to managing energy. Key elements to being successful with SEM include goal setting, progress tracking, and reporting. A linear regression-based energy model capturing the performance impacts of occupancy trends, weather, and other industry-specific variables is the foundation for building a customized energy-management plan through SEM. Enrolled customers are eligible to receive financial incentives for validated energy improvements attributed to SEM, which are not otherwise eligible for Focus on Energy incentives.

“Focus on Energy's SEM offering has made a positive impact in the way we've saved energy over the past two years at Ripon College. The tools and strategies have expanded our knowledge and allowed us to continue and work toward our end goal. It has been, overall, a great experience.”

- Keith Lauth, Assistant Director of Physical Plant, Ripon College

WHY PARTICIPATE?

- ▶ Enrollment incentive of \$1,500.
- ▶ Energy management system development support.
- ▶ Energy performance model and tracking tools.
- ▶ Energy savings incentives up to \$50,000.

Milestone	Frequency or Achievement Date
Hold a 30-60-minute virtual meeting with Focus on Energy SEM Team	Monthly
Develop an Opportunities Register	Second Month
Participate in an SEM gap analysis	Third Month
Complete an energy accounting of major equipment and uses	Fourth Month
Complete a process operational control review	Fifth Month
Deliver progress updates to the executive sponsor	Every Six Months
Identify an operational energy-savings opportunity	Sixth Month
Implement an operational energy-savings measure	Ninth Month
Measure progress addressing gaps in SEM gap analysis	Twelfth Month

step 1

BEFORE YOU APPLY:

- Confirm your gas and/or electric utility participates 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, call **800.762.7077**.

step 2

WHAT YOU'LL NEED:

- SEM Enrollment application (all sections of this form must be completed).
- Identified Executive Sponsor and Energy Champion.
 - Executive Sponsor – The highest-level manager available at the facility (typically the facility manager) who is responsible for ensuring the Energy Team has the resources it needs for successful participation in SEM.
 - Energy Champion – Individual responsible for the success of SEM at the facility. This individual is responsible for coordinating with their Focus on Energy Coach and internally with facility staff, such as the Energy Team and Executive Sponsor.
 - Focus on Energy Coach – Program representative working directly with the customer to support meeting SEM objectives, including but not limited to, documenting SEM progress and supporting the modeling and documentation of energy savings.
- Daily energy-use data for the past 36 months.

step 3

UNDERSTANDING YOUR INCENTIVE RATE AND OFFERING STRUCTURE:

- Customers will receive an enrollment incentive of \$1,500 (50% upon enrollment and 50% at the end of the 12-month period).
- Enrolled customers qualify for an incentive of \$0.02/kWh and \$0.20/therm saved on validated energy improvements.
- Customers are limited to \$50,000 in SEM incentives over a 12-month period (in addition to the \$1,500 enrollment incentive).
- Eligible projects are limited to those not otherwise eligible for prescriptive or custom incentives through Focus on Energy.
- Customers must be willing to share daily energy data on a monthly basis.
- Customers must be able to commit necessary resources to achieve the participation expectations listed in step 5.

step 4

SUBMIT ENROLLMENT APPLICATION:

- Enrollment approval is contingent upon the receipt of necessary documentation, including the enrollment application and energy data.
- Submit your completed enrollment application to **business@focusonenergy.com** or to your Energy Advisor.
- Customers will be notified in writing of their approved enrollment and will work with their Focus on Energy Coach to move forward in the participation process.

step 5

PARTICIPATION REQUIREMENTS:

- Support the preparation of a regression-based energy model and corresponding performance tracker.
 - Provide Focus on Energy with energy-consumption data and requested business variables.
 - Energy-model results and the performance tracker will be reviewed with the customer prior to the kickoff meeting.
- Hold an on-site SEM kickoff event with Focus on Energy.
 - Review the energy model and performance tracker with the Energy Team.
 - Establish an initial list of energy opportunities.
 - Develop an Action Plan for achieving participation milestones.
- Implement the Action Plan.
 - Participate in monthly meetings with Focus on Energy to review the performance tracker.
- Earn savings and incentives.
 - Receive an incentive of \$0.02/kWh and \$0.20/therm saved, up to \$50,000 in a 12-month period.
- Reapply.
 - Upon successful completion of the first 12 months of milestones, customers may re-enroll, and continue their SEM journey.

ELIGIBILITY REQUIREMENTS

Enrollment in SEM is required to qualify for incentives for low and no-cost projects. Projects started prior to acceptance into SEM will not be eligible for incentives.

HIGHER EDUCATION SEM ENROLLMENT APPLICATION

FOR PROJECTS ENROLLED BY 12/31/2024



Complete all sections. Incomplete applications cannot be processed and will delay approval. For an electronic copy of this form visit focusonenergy.com/business/education.

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

PARTICIPATING SITE INFORMATION

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

PARTICIPATING ADDRESS

CITY STATE ZIP

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)

OTHER ENERGY USED

APPROXIMATE ANNUAL KWH

APPROXIMATE ANNUAL THERMS

section 3

BUSINESS PAYMENT INFORMATION

Payee is responsible for any associated tax consequences.

For All Payees

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

COMPANY NAME

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9)

CITY STATE ZIP

ATTENTION TO (OPTIONAL)

section 4

CUSTOMER CONTACT INFORMATION

Executive Sponsor (Decision Maker)

NAME

TITLE

EMAIL

PHONE

SIGNATURE

DATE

Energy Champion (Day-to-Day Contact)

NAME

TITLE

EMAIL

PHONE

SIGNATURE

DATE

By signing this agreement, I demonstrate my alignment with the objectives of this offering, and I pledge to support the SEM efforts at this site. By signing this agreement, I also provide my permission for my electric and gas utility(ies) to share my energy data directly with Focus on Energy.

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

SIGN
HERE
←

PARTICIPATION REQUIREMENTS

NEED HELP? Call 800.762.7077



Use the eligibility requirements below to see if your business qualifies for program incentives. You can also visit **focusonenergy.com** to find savings opportunities specific to your business.

INFORMATION AND REQUIREMENTS

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

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.

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