

2023 BUSINESS OFFERINGS

# PRACTICAL ENERGY MANAGEMENT ENROLLMENT GUIDE



# HOW TO APPLY

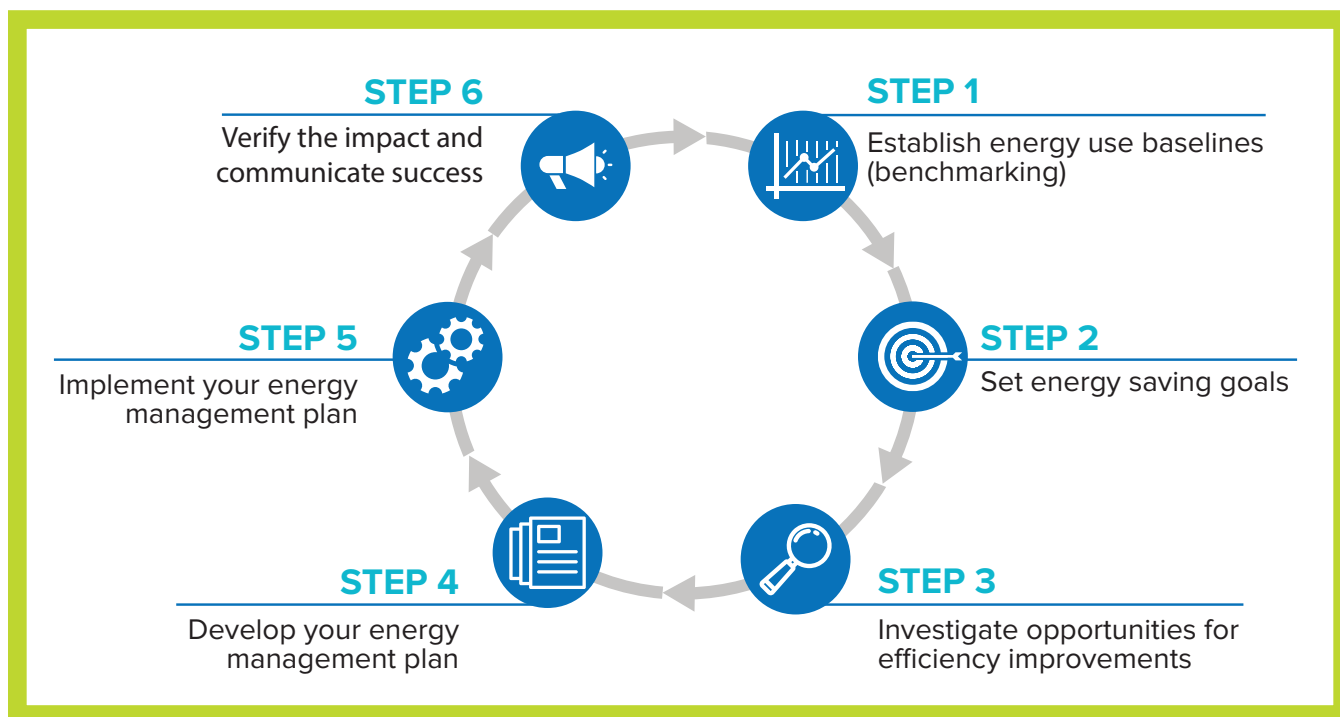
NEED HELP? CALL 800.762.7077



FOCUS ON ENERGY® provides the framework and resources to help your commercial or industrial facility establish, reach, and track progress to energy reduction goals through Practical Energy Management (PEM). Our Energy Advisors will walk you through six simple steps to take control of your energy usage and create a plan for future success. Use this guide to help you move through the process.

## Understanding PEM

With support from their Energy Advisor, customers participate in a six-step process aimed at understanding current energy usage and creating and implementing a continuous energy management plan. Customers can receive up to \$1,200 per facility for consistent energy monitoring, plus additional incentives for attending trainings and recognizing success with your company. Customers may apply for PEM incentives for up to three facilities in a calendar year.



# WHAT YOU'LL NEED



## step 1

### BEFORE YOU APPLY

- Confirm your gas and/or electric utility participates in Focus on Energy at [focusonenergy.com/utilities](https://focusonenergy.com/utilities).
- The PEM offering is available to commercial and small and midsize industrial customers. Schools, government, large industrial, agriculture, and multifamily customers should contact their Energy Advisor for available energy management offerings.
- Customers must have a minimum annual utility cost of \$15,000 to be eligible for PEM.
- Contact your Focus on Energy Advisor for assistance. If you do not know who your Energy Advisor is, call 800.762.7077 for assistance.

## step 2

### WHAT YOU WILL NEED

- PEM Enrollment Application with all sections of the form completed.
- Signed utility release form.
- Use of existing benchmarking software or willingness to use:
  - ENERGY STAR® PORTFOLIO MANAGER®.
  - American Society for Health Care Engineering (ASHE™) Energy to Care Dashboard.
  - Other software capable of inputting monthly utility usage, tracking energy-saving projects, and computing site energy intensity as approved by Focus on Energy.
  - Attend a one-hour PEM training conducted by your Energy Advisor. Attendance from all Energy Team members is strongly encouraged.

## step 3

### UNDERSTAND YOUR INCENTIVE RATE AND OFFERING REQUIREMENTS

#### Benchmarking Incentive

- After completing PEM training with your Energy Advisor, enter your monthly utility usage into benchmarking software to qualify for an incentive of \$200 per month for a maximum of six months (\$1,200 total).
- Utility data must be entered within 30 days of the bill date to be eligible for the monthly incentive.
- Confirmation of timely data entry must be provided to your Energy Advisor via granting permission to access your database of record or supplying screenshots upon entering utility data.

#### Recognition Incentive

- Receive up to \$500 in reimbursements for costs associated with promoting the success of your energy management program. Eligible costs include attending or hosting public relations opportunities, creating and distributing co-branded memos or other marketing materials, and sponsoring an employee engagement activity such as a Lunch and Learn.
- Reimbursements are capped at 100% of cost and advance approval is required.
- Internal labor costs are not reimbursable.

#### Training Reward

- Receive up to 100% of registration costs for energy-related trainings, up to \$1,000 per customer.
- Advance approval of training is required. Contact your Energy Advisor for details.

## step 4

### SUBMIT ENROLLMENT APPLICATION

- Enrollment approval is contingent upon receipt of necessary documentation, including the Enrollment Application, and utility release form.
- Trainings attended prior to enrollment are not eligible for reimbursement.

## step 5

### RECEIVE ENROLLMENT APPROVAL

- The customer is notified in writing of their approved enrollment and provided a Participation Guide detailing next steps in the process.
- Your Energy Advisor will schedule the initial PEM training within one month of enrollment.

# PRACTICAL ENERGY MANAGEMENT ENROLLMENT APPLICATION



## 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 nonprofits.)

- ☐ Sole Proprietorship ☐ Individual ☐ Single-Member LLC  
☐ C Corporation ☐ S Corporation ☐ Partnership  
☐ LLC - C Corp ☐ LLC - S Corp ☐ LLC - Partnership  
☐ 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 ☐ Individual ☐ Single-Member LLC  
☐ C Corporation ☐ S Corporation ☐ Partnership  
☐ LLC - C Corp ☐ LLC - S Corp ☐ LLC - Partnership  
☐ Other \_\_\_\_\_

### Payee Contact Information

NAME

EMAIL ADDRESS

**section 6**  
**BUSINESS PROPERTY TYPE**

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

- ☐ Financial Institution
- ☐ Grocery/Convenience Store
- ☐ Health Services
- ☐ Hotels & Lodging
- ☐ Information, Technical & Scientific Services
- ☐ Manufacturing  
(product): \_\_\_\_\_
- ☐ Office
- ☐ Religious & Spiritual Organization
- ☐ Restaurant
- ☐ Retail
- ☐ Vehicle Sales/Service
- ☐ Water/Wastewater
- ☐ Other: \_\_\_\_\_

**section 7**  
**ENROLLMENT CHECKLIST**

- ☐ Energy Team Members (Optional)
- ☐ 12 months of utility data or signed utility release form (Energy Advisor provided)

**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.

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



ENERGY TEAM MEMBERS

Energy Teams or Green Teams are critical to the success of a robust energy management plan. One individual should be identified as the primary point of contact, known as the Sustainability Champion.

**Optional:** Identify three additional stakeholders in addition to the Sustainability Champion to participate in the Energy Team. Ideal candidates include:

- An executive sponsor, ideally a champion from the C-suite. If you cannot engage an executive sponsor right away, start with department leads.
- The CFO or one of their direct reports.
- Operational leaders such as facilities, environmental services, housekeeping, space planning, supply chain, nutrition services, etc.
- A project or construction manager to help manage implementation and coordination efforts.
- A communications, marketing, or public affairs leader.
- Passionate employees who are regularly present at the facility.

NAME:		PHONE:	
TITLE:		EMAIL:	
AREA OF EXPERTISE:			

NAME:		PHONE:	
TITLE:		EMAIL:	
AREA OF EXPERTISE:			

NAME:		PHONE:	
TITLE:		EMAIL:	
AREA OF EXPERTISE:			



# 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](https://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.

### 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](https://focusonenergy.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 Trade Ally's invoice to the Focus on Energy customer.

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.

### Eligible Project Costs

Eligible project costs generally include all purchased or contracted equipment, materials and labor required for installation and startup of the proposed energy efficiency project. Costs associated with a customer's use of their internal labor, or previously owned equipment or materials obtained from a customer's inventory, are not eligible. An exception is normally made to allow internal labor costs of schools and government customers as eligible project costs (contact your Energy Advisor for clarification of eligibility requirements).

## 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.

**For more information,  
call 800.762.7077  
or visit [focusonenergy.com](https://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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