

2023 BUSINESS OFFERINGS

CUSTOM INCENTIVE GUIDE



HOW TO APPLY

NEED HELP? CALL 800.762.7077



Use this guide to help you move through the custom incentive process. To be put in contact with an Energy Advisor, call **800.762.7077** for assistance.

UNDERSTANDING CUSTOM INCENTIVES

Custom incentives are for energy efficiency and renewable energy upgrades not found in the FOCUS ON ENERGY® Incentive Catalogs. These incentives are for nonstandard technologies (e.g., industrial process equipment) or for projects which do not include a 1-for-1 replacement. Custom incentive amounts are determined by the estimated first-year energy savings when completing energy efficiency or renewable energy upgrades to equipment or processes.

Custom projects must involve measures which result in a permanent reduction in electric and/or natural gas energy usage due to an improvement in system efficiency. Projects resulting in reduced energy consumption without an improvement in system efficiency (e.g., manually turning equipment off) are not eligible for a custom incentive. However, projects involving the installation or addition of an automated control technology, such as an energy management system, may be eligible for an incentive.

The custom incentive rates found in this guide are eligible for projects requesting pre-approval between January 1 and December 31, 2023. Custom incentive rates are locked-in upon pre-approval of a proposed project.

RENEWABLE ENERGY

Biogas, biomass, wind, and solar thermal systems are eligible for a renewable energy custom incentive as detailed in this guide. Solar Photovoltaic (PV) systems may qualify for prescriptive renewable incentives. For more information on Solar PV incentives, visit **focusonenergy.com/business/renewables**.

WHAT YOU'LL NEED



Pre-approval is required prior to ordering equipment, issuing purchase orders or contracting labor. Projects initiated prior to pre-approval are ineligible for incentives. Notify your Energy Advisor as soon as possible if an expedited pre-approval is needed or if there is a time constraint for ordering equipment. Pre-approval is signified by issuance of an Incentive Agreement.

Incentive pre-approval is contingent upon receipt of energy savings calculations, project costs and documentation of how Focus on Energy influenced the project. The method and assumptions used by the applicant to calculate the annual energy savings will be reviewed by Focus on Energy as part of the pre-approval process. Focus on Energy is solely responsible for the final determination of the annual energy savings to be used in calculating the incentive amount.

step 1 BEFORE APPLYING

- Contact your Focus on Energy Advisor. 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

- Complete all sections of the Custom Project Information Form on pages 5-6. This form provides Focus on Energy with important background information to help us get started on your project. (This form can also be found on the Focus on Energy website at focusonenergy.com/custom.)
- Detailed scope of work including:
 - Existing equipment and relevant details (e.g., equipment manufacturer and model number, operating hours, etc.).
 - Proposed equipment and relevant details (e.g., equipment manufacturer and model number, operating hours, etc.).
- Proposal for qualifying upgrades, including:
 - Total project costs, including itemized materials/equipment, labor/installation, and commissioning, if needed.
- Manufacturer specification sheets for proposed equipment.
- Historical Utility Data
 - Work with your Energy Advisor to determine if historical utility data is needed to determine energy cost savings and project payback. A utility release form may be required to obtain your historical utility data from your service provider(s).

step 3 UNDERSTAND INCENTIVE RATES AND PROGRAM REQUIREMENTS

Custom incentives are based on estimated first year energy savings achieved from an energy efficiency upgrade. The calculated savings are multiplied by the incentive structure noted in the **Incentive Rates** table and are limited based on incentive type: energy efficiency (1-10 year payback), low payback (less than 1 year payback), or renewable energy (1-20 year payback).

Incentive Rates

Energy Efficiency (1-10 year payback)	Incentive Limit per Project
\$100 per peak kW*.	The lesser of \$300,000, 50% of project cost, or capped at a one-year payback.
\$0.05 per kWh saved.	
\$0.95 per Therm saved.	
Low Payback (less than 1 year payback)	Incentive Limit per Project
\$0.02 per kWh saved.	The lesser of \$20,000 or 100% of project cost, OR the lesser of \$200,000 or 50% of project cost.
\$0.20 per Therm saved.	
Renewable Energy (1-20 year payback)	Incentive Limit per Project
\$125 per peak kW*.	The lesser of \$300,000, 50% of project cost, or capped at a one-year payback.
\$0.10 per kWh saved or generated.	
\$1.25 per therm saved or generated.	

***Peak kW reduction is determined by the average kW load reduction or generation occurring between 2 p.m. and 6 p.m. on weekdays during June, July, August, and September.**

Custom Incentive Requirements

- Energy efficiency and renewable energy incentives will not be provided for projects with a simple payback of less than one year based on energy savings. Projects with a simple payback less than one year may be eligible for a Low Payback incentive.
- Energy efficiency incentives are limited to projects with a maximum simple payback of 10 years based on energy savings. Renewable energy incentives are limited to projects with a maximum payback of 20 years based on energy savings.
- Custom incentives cannot exceed the per project incentive limits shown in the Incentive Rates table above. The maximum total for all incentives a customer may receive per calendar year is \$400,000..
- Project cost is defined as the sum of material and/or installation of costs associated with the project.
- Incentives are only available for new (not used or refurbished) equipment. Maintenance projects are not eligible.

WHAT YOU'LL NEED



New Construction Eligible

- Working on a new construction project? Use the New Construction Online Tool to get started at focusonenergync.com.

step 4

REQUEST INCENTIVE PRE-APPROVAL

- Incentive pre-approval is contingent upon receipt of energy savings calculations, project costs, and documentation of how Focus on Energy influenced the project.
- Timeline for a project to receive pre-approval depends on several factors including the amount of time it takes for an Energy Advisor to receive required documentation, the complexity of the project, and the amount of the incentive.
- Once a project is pre-approved, the Energy Advisor will issue an Incentive Agreement (IA) to the customer for their signature.
 - Once an IA is issued, incentive funding is reserved for your project.
 - Customers have 65 days from pre-approval to sign and return the IA, indicating their intent to move forward with the project.
- Upon Focus on Energy's acknowledgment of receipt of the signed IA, the customer can proceed with the equipment order and installation.

step 5

COMPLETE YOUR CUSTOM PROJECT

- Complete the project by the Project Completion Deadline as indicated on the IA.
 - An extension can be requested by contacting your Energy Advisor in writing (email is preferred) and providing an updated final completion date and proof the project is moving forward (e.g., a PO or an invoice). Extensions are at the discretion of Focus on Energy.
 - Contact your Energy Advisor as soon as possible if the scope of work for the project changes during the course of design or installation to determine if the change will impact the savings and incentive for your project.
- Once the project is completed, alert your Energy Advisor who will confirm project status and then issue you a Project Completion Notice (PCN). The project is considered complete when the installed system is generating energy savings consistent with the proposed scope of work.
- Provide the following documentation to your Energy Advisor:
 - Detailed final invoice(s) including:
 - Quantities installed.
 - Manufacturer and model numbers.
 - Itemized project cost.
 - Customer name and installation address.
 - Trade Ally's name (if applicable)
 - Completed PCN with customer signature.
 - Please note if the scope of the original project has changed. Scope changes may result in an incentive adjustment. Custom incentives cannot exceed the originally pre-approved incentive amount.
- A site visit by the Energy Advisor for installation verification may be required prior to incentive payment.
- Completion paperwork will be reviewed for final qualification, and the incentive check will be issued within 6-10 weeks after receipt of all documentation.

CUSTOM PROJECT INFORMATION

FOR PROJECTS REQUESTING PRE-APPROVAL BY 12/31/2023



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 ☐ 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

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

CUSTOM PROJECT INFORMATION

FOR PROJECTS REQUESTING PRE-APPROVAL BY 12/31/2023



section 6

BUSINESS PROPERTY TYPE

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

- | | | |
|--|---|--|
| <input type="checkbox"/> Agriculture Producer
<input type="checkbox"/> Dairy - Traditional
<input type="checkbox"/> Dairy - Robotic
<input type="checkbox"/> Other: _____ | <input type="checkbox"/> Grocery/Convenience Store
<input type="checkbox"/> Health Services
<input type="checkbox"/> Hotels & Lodging
<input type="checkbox"/> Information, Technical & Scientific Services
<input type="checkbox"/> Manufacturing
(product): _____
<input type="checkbox"/> Office | <input type="checkbox"/> Religious & Spiritual Organization
<input type="checkbox"/> With K+ Daily Education
<input type="checkbox"/> Without K+ Daily Education
<input type="checkbox"/> Restaurant
<input type="checkbox"/> Retail
<input type="checkbox"/> Vehicle Sales/Service
<input type="checkbox"/> Water/Wastewater
<input type="checkbox"/> Other: _____ |
|--|---|--|

section 7

PROJECT BACKGROUND INFORMATION

Which statement best describes the status of your project (select one):

- ☐ Considering project
- ☐ Assessing feasibility
- ☐ Getting vendor bids and/or savings estimates
- ☐ Received management approval
- ☐ Purchased equipment
- ☐ Started installation

Tell us why you are pursuing this project:

- ☐ Enhance employee/customer comfort
- ☐ Reduce maintenance costs
- ☐ Replace worn out equipment
- ☐ Reduce energy costs
- ☐ Achieve company goal or mandate
- ☐ Other: _____

Tell us how Focus on Energy can help you:

- ☐ Exploring options
- ☐ Assurance of the technical feasibility of the technology
- ☐ Verifying vendor savings estimates
- ☐ Showing the value to management
- ☐ Incentive to help reduce initial cost and/or trim payback
- ☐ Other: _____

section 8

PROJECT TIMELINE AND DESCRIPTION

PROJECT START DATE	
ESTIMATED PROJECT COMPLETION DATE	
I certify no purchase orders, equipment purchases, or contracted labor have been initiated for this project	Yes <input type="checkbox"/>
Itemized proposal attached	Yes <input type="checkbox"/>
Specification sheet(s) attached	Yes <input type="checkbox"/>
Information on existing equipment (make, model, etc.), system operation, and building operation attached	Yes <input type="checkbox"/>
Brief Project Description	

section 9

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

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.

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 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**

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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