2023 BUSINESS OFFERINGS

TRIBAL NATION ENERGY PLAN APPLICATION

focus on energy®

Partnering with Wisconsin utilities

HOW TO APPLY

NEED HELP? **Call 800.762.7077**

FOCUS ON ENERGY® is accepting applications from Tribal Nations seeking financial support to create or update an energy plan for their community. The energy plan should identify and share steps for achieving energy and resiliency goals for the Tribal Nation. Successful energy planning involves:

- Engaging community stakeholders.
- Tracking energy use.
- Setting energy goals.
- Completing technical and financial planning.
- Implementing tasks and projects.

Applicants are encouraged to work directly with an Energy Advisor to submit an application. To find an Energy Advisor, visit focusonenergy.com/ea-map or email business@focusonenergy.com.

Focus on Energy is offering up to $15,000 for development of the plan utilizing an external vendor or internal labor. Maximum incentive request is capped at 100% of the cost of the plan.

ENERGY PLAN REQUIREMENTS

section 1
IDENTIFICATION AND TRENDING OF CURRENT ENERGY USE

- Include an Energy Baseline table (see Appendix A) or a report from an online benchmarking tool, such as ENERGY STAR® Portfolio Manager®.
- Work with the customer's utility to develop an Energy Profile including:
  - Key facts of the building's energy use.
  - Current energy costs.
  - Projected future energy use and costs.

section 2
CREATION OF LONG- AND SHORT-TERM ENERGY GOALS

- Identify specific and actionable energy goals which are time bound.
- Identify strategies for achieving goals.
  - Strategies are detailed "sub-goals" breaking the overall goal(s) down into measurable components.

section 3
DEVELOP AN ACTION PLAN

- Identify actions to be taken to meet the goals identified in Section 2 and a timeline for completion.
- Strategies should be assessed and prioritized by feasibility, access to financing, and impact to goals.

section 4
PLAN FOR COMMUNITY ACCEPTANCE OF PLAN

- Create an energy team representing a variety of stakeholder groups.
- Establish a timeline for public release and gathering feedback.

PROJECT IDEA

Looking to develop new projects or update a portion of your plan? Include the information in the "Energy Plan Description" section and submit the application to Focus on Energy for consideration.

STEPS TO PARTICIPATE

step 1

- Determine your internal steps for completing an energy plan. Who will you engage, if you will use an outside vendor, and what costs will be associated with the plan?

step 2

- Submit application including the items identified in the application submission checklist.

step 3

- Complete plan and submit to Focus on Energy within 12 months of application approval.

step 4

- Upon verification of the completed plan, Focus on Energy will request final costs and a project completion notice.

APPLICATION SUBMISSION CHECKLIST

Energy Plan Description

- Identify if a plan is being updated or created, why a plan is needed, and how it will be used. This incentive can also be used to update portions of the energy plan including any of the 'Energy Plan Requirements' on the previous page.

Preliminary Project Budget

- Identify costs of vendor (if involved) or estimated internal costs for compiling a plan.

Vendor/Trade Ally Information (Optional)

- Include information for any third parties to complete the plan.

Timeline

- A plan is required to be submitted within 12 months of approval. Extensions will be considered.

APPENDIX A

EXISTING COMMUNITY FACILITY ENERGY USAGE				
Facility Type (Examples Below)	**Electric Usage (Annual, kWh)**	**Heating Fuel Usage (Annual, Gallons)**	**Other Heating Sources**	**Date of Last Major Facility Renovation**
Tribal Administration Office(s)				
Building Tribal Building				
Health Clinic				
City Office				
Community Shop				
School Building				
School Building				
School Building				
Other Community Building				
Other Community Building				
Other Community Building				
Other Community Building				

RENEWABLE ENERGY RESOURCES				
	Readily Available Resource? (Y/N)	**Feasibility/Resource Assessment/Study Completed? (Y/N)**	**Potential Project Identified? (Y/N)**	**Facility Past Projects Completed? (Y/N)**
Wind				
Solar PV				
Solar Thermal				
Biomass/Wind				
Other (describe)				

TRIBAL NATION ENERGY PLAN ENROLLMENT APPLICATION

FOR PROJECTS ENROLLED BY 12/31/2023

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Complete all sections. Incomplete applications cannot be processed and will delay payment of incentives. For additional copies of this form, visit **focusonenergy.com/catalogs**.

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

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)

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

section 4

CUSTOMER CONTACT INFORMATION

NAME

TITLE

EMAIL

PHONE

I, the undersigned Customer, 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.

SIGN HERE

CUSTOMER SIGNATURE

NAME (PRINT) DATE

Submit your completed application and supporting documentation to **business@focusonenergy.com**.

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