



**Efficiency Works**<sup>TM</sup>  
Business



# **Efficiency Works Business**

## **Study Incentives Program Guide**

**Effective May 2025**

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## Study Incentives program overview

The Efficiency Works Business study incentives program is part of the Efficiency Works portfolio, offering versatile support solutions relating to in-depth analysis beyond our standard free energy advising and assessment services. The study incentives were designed with the ability to serve commercial customers who are interested in deeper, more technical dives into key areas interest for customers and our electric utilities through education and support. The program's intent is to provide a quality, customizable study reports that will help support a customer's inquiries into building and process electrification, Building Performance Standards (BPS) compliance, and fleet electrification.

## Incentive contacts

**Web:** [www.EfficiencyWorks.org](http://www.EfficiencyWorks.org) **Email:** [business@efficiencyworks.org](mailto:business@efficiencyworks.org) **Phone:** 907-229-4823

## Incentive funding availability

Incentives are awarded on a first come, first served basis while funding is available. Funds for incentives are limited and subject to budget availability. Program requirements including but not limited to incentive values, structures, deadlines and caps are subject to change without advance notice and may vary by utility territory depending on the pace of demand in each territory and the available incentive budget. Check for announcements on <https://efficiencyworks.org> for recent program changes and get up to date incentive information or contact Efficiency Works Business at [business@efficiencyworks.org](mailto:business@efficiencyworks.org) or 970-229-4823 for more information.

**Disclaimer:** All study incentive reports are required to include the following disclaimer to be included when an Efficiency Works incentives are being recommended or highlighted.

Rebates have been estimated for each applicable energy efficiency opportunity. Rebate values are specific to the assumed project details and are subject to change based on project specifics. Rebates and incentives outlined are not guaranteed and must be approved by Efficiency Works before the program will commit funds or make payment. Funds for incentives are subject to availability, are offered on a first come first served basis and are subject to project caps. Program requirements including incentive levels and limits are subject to change without advanced notice and may vary by utility. Please refer to the Efficiency Works business program guide for full program rules and requirements. Reach out to Efficiency Works at [business@efficiencyworks.org](mailto:business@efficiencyworks.org) with any questions.

**Reminder:** Service providers must be listed in order to work in the Study Incentives program and must complete an online pre-approval application and receive approval confirmation from Efficiency Works Business before conducting a customer assessment. Assessments that do not receive pre-approval confirmation will be ineligible for incentives.

## Efficiency Works building and process electrification study incentives

The Efficiency Works Business building and process electrification (BPE) study incentive is part of the Efficiency Works portfolio, offering versatile support solutions relating to building and process electrification. The building and process electrification study incentive was designed with the ability to service customers who are interested in electrification through education and support. The program's intent is to provide a quality, customizable study report that will help support a customer's building and process electrification inquiries through data collection.

The BPE study incentive uses a network of Efficiency Works listed service providers (SPs) to conduct assessments for eligible customers. When participating in a BPE study with a listed SP through the program, Efficiency Works Business offers an incentive intended to offset some or all of the study's cost. Incentive amounts are based on the scope of the study and are capped at the total cost of the study. For building only electrification, up to \$15,000 in incentives is available and if the customer elects to include process electrification in addition to building electrification, up to \$25,000 in incentives is available.

### Building and process electrification study incentive customer participation and eligibility criteria

Customers interested in receiving a Building and Process Electrification Study incentive will participate in the program with the support of their selected service provider (contractor). Customers are required to utilize a listed Building and Process Electrification study incentive provider from the Efficiency Works "[Find a Service Provider](#)" page. Assessments completed by vendors not on this list or customer self-assessments will not be eligible for study incentives.

**Preapproval is required for all BPE study incentives and Efficiency Works will review all applications to ensure the following criteria has been met at a minimum to participate:**

1. The building identified in the incentive application is a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. The building owner or owner's representative anticipates the need to replace equipment within the next 5 years.
3. An energy audit has been completed for the building with the last 3 years.
4. The building must be an existing building or major renovation project. New construction projects are not eligible for the Building and Process Electrification study incentive.
5. The owner agrees to share the final report.

**Project definition:** A standard project is defined as an agreement between the customer and the SP for the delivery of a BPE study report for a contiguous building where all the above

criteria are met. In some instances, a non-standard project may be considered for eligibility, examples include:

- A facility may justify being approached in multiple phases or projects if a facility operates as a campus with varied building user cases, has varied levels of occupancy, and/or has a central heating or cooling plant being addressed after the building end-uses. Projects are not defined by the electric meter and any facility with more than one electric meter is not automatically eligible for more than one study incentive.
- More than one facility with similar use cases, occupancy, and current controls schemes owned or operated by the same participant may be bundled together to meet the eligibility requirements.

It is required that requests for non-standard projects are communicated to the Efficiency Works Business team prior to the participant entering a contract with a service provider. Additional documentation to outline the justification for a non-standard project must be provided for review. To initiate a non-standard review, complete a draft project application and email the Efficiency Works Business team describing the nature of the request and include any relevant documentation to support the justification. Approval for non-standard projects will occur via email prior to project application submission so accurate project scope discussions can take place with the participant prior to them signing the incentive agreement. Any non-standard projects are considered ineligible until express written permission is given by the Efficiency Works Business team.

#### **Participant definition:**

For the purposes of Efficiency Works energy efficiency programs, a participant is defined as a company or organization that is taking ownership and responsibility for the site and project, and receives commercial electric service from one of the following utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications or Loveland Water and Power. A participant may be a holder of a single account, multiple accounts in aggregate or corporate accounts. For participants with multiple facilities, eligibility will be evaluated on a site-by-site basis depending on each project scope and program budget. Participants with one or more sites can participate in multiple Efficiency Works projects and programs but will be subject to any applicable participant rebate caps.

#### **Eligibility and final approval:**

Efficiency Works retains the right to make final determination of participant and project eligibility for standard and non-standard projects. All projects and scopes require preapproval before any funds are committed. The Efficiency Works Business team will work with the SP and participant to define the building characteristics prior to issuing a final decision on eligibility.

Customers can find qualified listed BPE study incentive service providers on the Efficiency Works [“Find a Service Provider”](#) page. The Efficiency Works SPs in this database have demonstrated their interest and ability in helping customers complete BPE study assessments.



Customers are encouraged to solicit two or more bids and should ensure that SPs have insurance coverage in the types and amounts appropriate for the projects being completed.

### Building and process electrification study services and incentives

Through the Efficiency Works study incentives program, qualifying SPs will provide a comprehensive BPE study for eligible customer buildings and/or processes. The study report will aim to help identify building and process electrification opportunities based on building owner interests.

Efficiency Works offers two tiers of incentives based on the scope of the project. The customer may be eligible for the incentive amounts below based on the information entered on the incentive pre-approval application, up to 100% of the study cost. For example, a scope that only considers building electrification would be considered Tier 1 and eligible for a \$15,000 incentive, but a scope that includes building and process electrification would be considered Tier 2 and eligible for a \$25,000 incentive.

Tier	Description	Incentive
Tier 1	Building only	\$15,000
Tier 2	Building and process	\$25,000

SPs must complete an online pre-approval application and receive approval confirmation from Efficiency Works Business before conducting a customer assessment. Assessments that do not receive pre-approval confirmation will be ineligible for incentives. The pre-approval application includes uploading a project proposal and incentive agreement form signed by the customer. This will allow the program to confirm budget availability and reserve funds for the scheduled assessment(s). See the Funding Availability section at the beginning of this guide for more information.

Examples of customer information that may be required at incentive pre-approval is listed below:

- Building site address and customer mailing address
- Building ownership (owned or leased)
- Tenant information
  - Number of tenants, and
  - Detail if tenants are directly metered or sub-metered and pay for their own utility usage, or if tenants pay for utilities through triple-net (NNN) lease structure and do not have a utility account or pay for their specific energy usage
- Building usage type (office, healthcare, retail, multifamily, etc.) and annual operating hours
- Square footage
- Occupancy levels

- General envelope description
- Inventory of existing heating, cooling, and ventilation equipment (including domestic hot water)
- Inventory of other natural gas-consuming equipment
- Incentive payee (may be paid to customer, SP or 3<sup>rd</sup> party)
- Electric utility
- Total estimated study cost as provided to the customer.
- Estimated study completion date.
- A signed BPE study incentive agreement (reference version available in Appendix A)
- A proposal outlining the study site address, scope and cost.

After the building and process electrification study is complete and presented to the customer, the SP may submit the final application documents and request for incentive payment.

Examples of information required at final submittal is listed below:

- Study results
  - List of recommendations
  - Potential energy savings
  - Potential energy use electrified
  - Potential utility demand increase (kW) for summer and winter
  - Potential natural gas/propane savings (therms)
  - Potential EUI impact
  - Potential GHGI impact
  - Estimated infrastructure costs
  - Estimated equipment costs
  - Estimated total costs
  - Whether electric service upgrade will be needed
  - Estimated customer interest
  - Estimated project timing
  - Client's interest/reason for seeking the assessment
  - Building ownership (owned or leased)
  - Tenant information:
    - Number of tenants, and
    - Detail if tenants are directly metered/sub-metered and pay for own utility usage – or if tenants pay for utilities through triple-net (NNN) lease structure and do not have utility account or pay for their specific energy usage
  - Building usage type (e.g. office, healthcare, retail, multifamily, etc.)
  - Square footage
  - Occupancy levels
  - General envelope description
  - Utility meter information including Applicable electric utility meter(s) rate structure(s) & data availability
  - Recommendations:



- Replacement/electrification recommendations and an estimate of remaining useful life for gas-fired space heating and water heating equipment, including equipment sizing.
  - Estimate of energy impact and associated potential GHGI impact for electrification recommendations.
  - At the building owner's request, provide an estimate of remaining useful life and replacement options for gas-fired commercial kitchen equipment.
- Documents:
  - Final report
  - Supplemental data
  - Final invoice with incentive deducted from the cost if SP is the incentive payee
  - Signed agreement confirming the study was delivered, BPS compliance study incentive terms and conditions referenced in Appendix B
- Additional specifics that are required to be submitted:
  - Inventory of existing heating, cooling, and ventilation equipment (including domestic hot water), lighting, and other electricity and natural gas equipment
  - Inventory of other notable equipment (e.g., EV charging, onsite solar, etc.)
  - Utility meter information including applicable electric utility meter(s) rate structure(s) & data availability.
- If recommending any upgrades to Building Automation Systems that may be aided by a retrocommissioning study, the following language is required to be included in the final report.
  - This report includes recommendations to adjust Building Automation System schedules and set points that have the potential to be explored more in-depth through a retrocommissioning study. The Efficiency Works Building Tune-up Retrocommissioning paths provide an incentive to help offset the cost of a retrocommissioning study to identify Building Automation System updates for energy efficiency and optimization. The study must be commissioned by an approved Efficiency Works RCx service provider (RSP). Efficiency works will incentivize up to 100% of the study cost with a maximum study fee incentive of \$40,000 for RCx Full projects and \$15,000 for RCx Light projects. During the study, multiple detailed site assessments, diagnostic testing and trending will be completed to evaluate facility operations and equipment functionality. After the investigation is completed and reviewed, the RSP will work hand in hand with the participant's implementation team to address the approved measures. The participant must commit to spend at least \$10,000 for RCx Full and \$2,500 for RCx Light on measures with a two-year payback or less. To learn more and get started visit <https://efficiencyworks.org/business/building-tune-up/>

## Building and process electrification study program process and payment

The following steps represent the full process of participation in the BPE study incentive:

1. Customer identifies a building (may or may not include a process) they are interested in electrifying.

2. Customer begins the process of determining program and SP eligibility.
  - a. Determine eligibility, see Customer Eligibility section.
  - b. Solicit study bids from and select a listed Building and Process electrification study service provider (SP) to perform the study through the program. It is recommended to collect three bids, but it is not required.
    - o Reminder: Incentive funds are subject to change without notice. Check the announcements on <https://efficiencyworks.org/> for recent program changes or contact Efficiency Works for more information prior to finalizing proposals and signing contracts to ensure accurate program expectations.
  - c. Customer and SP enter into a contract for the study work and the customer signs the BPE study incentive agreement.
3. SP submits for incentive pre-approval.
  - a. SP submits an online application via their service provider portal.
  - b. If the project meets program rules, a pre-approval code will be issued reserving rebate funds, usually within 5 business days.
  - c. Program incentive funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
4. SP completes the BPE study assessment and presents findings to the customer.
  - a. SP requests building data from the customer and the customer provides data in a timely manner.
  - b. SP then works with building data and the customer to complete the analysis and generate the study report.
  - c. SP presents the findings of the report to the customer and delivers the final report electronically.
  - d. Customer signs the BPE study Incentive Completion Terms and Conditions.
  - e. Document and inform Efficiency Works of any changes to the project scope that may impact the final study incentive amount such as changes to building information or study cost. There is no guarantee that incentive amounts will increase based on project scope changes after pre-approval is issued.
5. SP submits final paperwork via the pre-approved online application.
  - a. Submit the final incentive application with all required documentation within 45 days of the study completion date.
  - b. A final invoice is required at final submittal and must contain the following information at a minimum:
    - i. Assessment site address
    - ii. Reference to the scope of work completed.
    - iii. Total project cost. If the SP is receiving the incentive, the exact incentive amount must be shown as deducted from the total project cost.

- c. Program incentive funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests prior to final submission shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
- 6. Receive incentive payment.
  - a. Rebate payment can be sent to any of the following:
    - i. The customer
    - ii. The SP completing the study
    - iii. A 3<sup>rd</sup> party
  - b. Rebate applications are typically processed and paid within 4-6 weeks of submittal.
  - c. Payments are made by physical check and can be mailed to any location in the United States.

### Building and process electrification study incentive FAQs

#### **Q: What is included in a building and process electrification report?**

A building and process electrification report offers an in-depth analysis of a customer's building and processes by providing insights into potential financial impacts and emission reductions from replacing or electrifying gas-fired heating and water heating equipment, including equipment sizing and an estimate of remaining useful life. Participants can expect a customized, comprehensive report, and a summary of available financial assistance resources to offset the upfront capital costs.

#### **Q: Who qualifies for the Efficiency Works Building and Process Electrification Study (BPE)?**

To be eligible to participate, customers must:

1. Be a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. Have the legal right and authority to make building changes at the place(s) of business identified on the incentive application.
3. Lease or own equipment that dwell within the building respective municipal utility service area. Equipment shipped to other facilities outside the service area do not qualify.

#### **Q: Is there a requirement around the building size?**

Unlike the BPS study, there is no minimum building square footage to participate. General building requirements include:

1. Be a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. The building owner or owner representative anticipates the need to replace equipment within the next 5 years.
3. Have completed an energy audit within the last 3 years,
4. Must be an existing building or major renovation project.
5. Owner must agree to share the final report.

**Q: What do the program's incentives cover?**

A financial incentive will be paid to participants to cover up to the entire cost of the building and process electrification study. The amount of the incentive will vary by building size and scope and is paid per study. Depending on the scope of services and the price structured used by the selected listed service provider (SP), the incentive amount may or may not covered the entirety of the BPE study.

**Q: Are incentives bill credits or cash payouts?**

Incentives are paid in cash via a physical check mailed to the recipient.

**Q: Do customers need to use specific vendors for performing a BPE study?**

Yes, an approved list of Building and Process Electrification Study service providers is published on the Efficiency Works website here: <https://efficiencyworks.my.site.com/tradeally/s/findtradeally>. Studies completed by vendors not on the Efficiency Works listed service provider page with the BPE specialty are not eligible for incentives.

**Q: What is the definition of a process that is eligible for the Tier 2 incentive?**

Process is defined as the turning of raw materials or parts into finished goods through the use of tools, human labor, machinery, and chemical processing.

**Q: Are other funding sources available to cover the costs of building and process electrification?**

Yes, Efficiency Works offers custom incentives for process electrification. To learn more about custom process electrification incentives, please visit: <https://efficiencyworks.org/business/rebates/>.

**Q: Do any other grants, rebates or funding programs work with the building and process electrification study incentive?**

Yes, state and/or federal building and process electrification incentive programs are fully stackable with Efficiency Works incentives. A list of additional funding resources will be provided with the study.

**Q: Do I have to make any financial commitments to participate in the BPE?**

The cost of a building and process electrification study is offset partly by the program's two incentive tiers. Exact financial commitments are dependent on the service provider and the proposal that customers will select. Participants are NOT required to make any building or process upgrades recommended through the study.

**Q: How long does the building and process electrification study process take?**

Following the completion of the program application, the BPE study process takes approximately 3 to 6 months.

**Q: Who do I contact with additional questions?**

Efficiency Works Business program staff can be reached during regular business hours via phone at (970) 229-4823 or via email at [business@efficiencyworks.org](mailto:business@efficiencyworks.org).

**Q: What are the next steps for customers interested in a BPE study?**

Customers can reach out to a qualified Building and Process Electrification Study service provider listed on the Efficiency Works website to begin the study process. Customers can also contact Efficiency Works Business to request information about next steps. Visit the Efficiency Works website for more information at <https://efficiencyworks.org>.

## Efficiency Works Building Performance Standards (BPS) compliance study incentive

The Efficiency Works Business Building Performance Standards (BPS) Compliance Study incentive is part of the Efficiency Works portfolio, offering versatile support solutions and information for commercial BPS compliance. The program's intent is to provide quality, customizable information to customers subject to the State of Colorado BPS requirements to help customers make informed and actionable decisions about their path to compliance.

The BPS compliance incentive uses a network of Efficiency Works listed service providers (SPs) to conduct assessments for eligible customer buildings. When participating in a BPS study assessment with a listed SP through the program, Efficiency Works Business offers an incentive intended to offset some or all of the study's cost. Incentive amounts are based on customer building size and which bonus incentives the project is eligible for as outlined in the incentives section of this guide. Currently eligibility requires that buildings be subject to the State of Colorado BPS requirements. The graphic below shows the BPS compliance study incentive process overview for customers and SPs:

### BPS Compliance Study customer participation and eligibility criteria

Customers interested in receiving a BPS compliance study incentive will participate in the program with the support of their selected SP. Customers are required to utilize a listed BPS compliance study provider from the Efficiency Works "[Find a Service Provider](#)" web page. Assessments completed by vendors not on this list or customer self-assessments will not be eligible for study incentives. In reviewing project applications, Efficiency Works will identify evidence that a building is subject to the State of Colorado BPS requirements, and that a BPS compliance study would aid in planning the path to compliance. The following criteria shall be met at a minimum to participate:

1. The building identified in the incentive application is a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. The building is subject to the State of Colorado BPS requirements.
3. The building is existing and complete, not under construction or planned to be constructed.
4. Participant has the legal right and authority to install equipment and perform maintenance work on the building.
5. Participant agrees to share the final study report with Efficiency Works.

**Project definition:** A standard project is defined as a contiguous building that is eligible for one study incentive if all the above criteria are met, where an agreement has been made between the customer and the SP for the delivery of a BPS compliance study report. In some instances, a non-standard project may be considered for eligibility, for example:



- A facility may justify being approached in multiple phases or projects if a facility operates as a campus with varied building use cases, has varied levels of occupancy, and/or has a central heating or cooling plant being addressed after the building end-uses. Projects are not defined by the electric meter, and any facility with more than one electric meter is not automatically eligible for more than one study incentive.
- More than one facility with similar use cases, occupancy, and current controls schemes owned or operated by the same participant may be bundled together to meet the eligibility requirements.

It is required that requests for non-standard projects are communicated to the Efficiency Works Business team prior to the participant entering a contract with a service provider. Additional documentation to outline the justification for a non-standard project must be provided for review. To initiate a non-standard review, complete a draft project application and email the Efficiency Works Business team describing the nature of the request and include any relevant documentation to support the justification. Approval for non-standard projects will occur via email prior to project application submission so accurate project scope discussions can take place with the participant prior to them signing the incentive agreement. Any non-standard projects are considered ineligible until express written permission is given by the Efficiency Works Business team.

#### **Participant definition:**

For the purposes of the Efficiency Works energy efficiency programs, a participant is defined as a company or organization that is taking ownership and responsibility for the site and project and receives commercial electric service from one of the following utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications or Loveland Water and Power. A participant may be a holder of a single account, multiple accounts in aggregate or corporate accounts. For participants with multiple qualifying facilities, eligibility will be evaluated on a site-by-site basis depending on each project scope and program budget. Participants with one or more sites can participate in multiple Efficiency Works projects and programs but will be subject to any applicable participant incentive caps.

#### **Eligibility and final approval:**

Efficiency Works retains the right to make final determination of participant and project eligibility for standard and non-standard projects. All projects and scopes require preapproval before any funds are committed. The Efficiency Works Business team will work with the SP and participant to define the building characteristics prior to issuing a final decision on eligibility.

Customers can find qualified listed BPS compliance study service providers on the Efficiency Works "[Find a Service Provider](#)" web page. The Efficiency Works SPs in this database have demonstrated their interest and ability in helping customers complete BPS compliance study assessments. Customers are encouraged to solicit two or more bids and should ensure that SPs have insurance coverage in the types and amounts appropriate for the projects being completed BPS compliance study services and incentives.

Through the Efficiency Works study programs, qualifying SPs will provide a comprehensive BPS compliance assessment for eligible customer buildings. The assessment will include the following at minimum:

- Estimated upgrade costs and simple payback calculations
- Estimated Energy Use Intensity (EUI) impact for each measure
- Estimated emissions impact (GHGI) for each measure
- Ideal compliance path specific to customer opportunity
- Recommendations for any target adjustments necessary for compliance
- Outlined path to compliance

Efficiency Works offers different incentives and bonus amounts based on the size of the building, the BPS statute it is subject to, and other qualifications. The customer may be eligible for the incentive amounts below based on the information entered on the incentive pre-approval application, up to 100% of the study cost. For example, a building of 60,000ft<sup>2</sup> that is subject to the State of Colorado BPS requirements and elects to do the electrification study focus would be eligible for up to \$20,000 in incentives. Efficiency Works has the right to modify incentive amounts per assessment at any time if actual results show the incentive is too high or low.

Offering	Eligibility	Incentive
Building Performance Standards compliance study incentive	Buildings ≥ 50,000 sq. ft. and subject to the State of Colorado BPS, with commercial electric service from one of the 4 eligible municipal utilities.	\$15,000
Building Performance Standards bonus	All requirements of the BPS study incentive, plus eligibility requirements outlined in the BPS bonus application. Not available to customers of Estes Park Power and Communications.	\$5,000
Electrification study focus bonus	All requirements of the BPS study incentive, plus electrification study.	\$5,000

SPs must complete an online pre-approval application and receive approval confirmation from Efficiency Works Business before conducting a customer assessment. Assessments that do not receive pre-approval confirmation will be ineligible for incentives. The pre-approval application includes uploading a project proposal and incentive agreement form signed by the customer. This will allow the program to confirm budget availability and reserve funds for the proposed assessment(s). See the Funding Availability section at the beginning of this guide for more information.

Examples of customer information that may be required at incentive pre-approval is listed below:

- Customer information
  - Company name
  - Contact information

- Site address
  - Mailing address
- Service provider information
- Building information
  - Site address
  - Electric utility
  - Building use type (office, healthcare, retail, multifamily, etc.)
  - Square footage
  - Ownership (owned or leased)
  - Annual operating hours
  - Year built
  - Current building EUI
  - BPS EUI target
  - General envelope description
  - Annual electricity and natural gas/propane use
  - Occupancy levels
- Project information
  - Incentive payee (may be paid to customer, SP or 3<sup>rd</sup> party)
  - Total estimated study cost as provided to the customer
  - Estimated study start and completion date
- Tenant information, if applicable
  - Number of tenants
  - Details if tenants are directly metered or sub-metered and pay for their own utility usage, or if tenants pay for utilities through triple-net (NNN) lease structure and do not have a utility account or pay for their specific energy usage
- A signed BPS compliance study incentive agreement (reference version available in Appendix A)
- A proposal outlining the study site address, scope and cost

After the BPS compliance study is complete and presented to the customer, the SP may submit the final application documents and request for incentive payment. Examples of information required at final submittal is listed below:

- Study results
  - List of recommendations
  - Recommended compliance path
  - Whether an adjustment request is needed
  - Potential energy savings
  - Potential energy use electrified
  - Potential utility demand increase (kW) for summer and winter
  - Potential natural gas/propane savings (therms)
  - Potential EUI impact
  - Potential GHGI impact
  - Estimated infrastructure costs

- Estimated equipment costs
- Estimated total costs
- Whether electric service upgrade will be needed
- Estimated customer interest
- Estimated project timing
- If recommending any upgrades to Building Automation Systems that may be aided by a retrocommissioning study, the following language is required to be included in the final report.
  - This report includes recommendations to adjust Building Automation System schedules and set points that have the potential to be explored more in-depth through a retrocommissioning study. The Efficiency Works Building Tune-up Retrocommissioning paths provide an incentive to help offset the cost of a retrocommissioning study to identify Building Automation System updates for energy efficiency and optimization. The study must be commissioned by an approved Efficiency Works RCx service provider (RSP). Efficiency works will incentivize up to 100% of the study cost with a maximum study fee incentive of \$40,000 for RCx Full projects and \$15,000 for RCx Light projects. During the study, multiple detailed site assessments, diagnostic testing and trending will be completed to evaluate facility operations and equipment functionality. After the investigation is completed and reviewed, the RSP will work hand in hand with the participant's implementation team to address the approved measures. The participant must commit to spend at least \$10,000 for RCx Full and \$2,500 for RCx Light on measures with a two-year payback or less. To learn more and get started visit <https://efficiencyworks.org/business/building-tune-up/>
- Documents:
  - Final report
  - Supplemental data
  - Final invoice with incentive deducted from the cost if SP is the incentive payee
  - Signed agreement confirming the study was delivered, BPS compliance study incentive terms and conditions referenced in Appendix B
- Additional specifics that are required to be submitted:
  - Inventory of existing heating, cooling, and ventilation equipment (including domestic hot water), lighting, and other electricity and natural gas equipment
  - Inventory of other notable equipment (e.g., EV charging, onsite solar, etc.)
  - Utility meter information including applicable electric utility meter(s) rate structure(s) & data availability

### Building Performance Standards bonus

The Building Performance Standards Bonus is available to nonprofit businesses that provide critical community services and multifamily properties. The bonus provides an additional \$5,000 to cover up to 100% of a BPS compliance study cost. To receive bonus funds, the study must be preapproved after January 1, 2025, and completed with all final paperwork submitted before

November 15, 2025. Bonus funding is limited and subject to availability. Standard rebate caps and requirements apply. See the Program Guide for details.

To apply for the bonus, the Building Performance Standards bonus application must be completed and signed by the customer and submitted along with the project's preapproval application. This bonus application can be found in appendix C.

### Electrification study focus bonus

The electrification study focus bonus is available for projects that go beyond the baseline Building Performance Standards compliance study report requirements by including a focus on electrification in the recommended measures and compliance paths. A building electrification study report offers an in-depth analysis of a customer's building and processes by providing insights into potential financial impacts and emission reductions from replacing or electrifying gas-fired heating and water heating equipment, including equipment sizing and an estimate of remaining useful life. A BPS compliance study report that is eligible for this bonus must:

- Include an electrification option for all proposed measures
- Meet all electrification study incentive report requirements including:
  - Replacement/electrification recommendations and an estimate of remaining useful life for gas-fired space heating and water heating equipment, including equipment sizing.
  - Estimate of energy impact and associated GHG reduction for electrification recommendations.
  - At the building owner's request, provide an estimate of remaining useful life and replacement options for gas-fired commercial kitchen equipment.

If a project receives the electrification study focus bonus, the subject building will become ineligible for any other Efficiency Works electrification study incentives for a period of 3 years following the completion of the project.

### BPS Compliance Study incentive process and payment

The following steps represent the full process of participation in the BPS compliance study incentive:

1. Customer identifies a building that is subject to the State of Colorado BPS
2. Customer begins the process of determining program and SP eligibility.
  - a. Determine eligibility, see Customer Eligibility section
  - b. Solicit study bids from and select a listed BPS compliance study service provider (SP) to perform the study through the program. It is recommended to collect three bids, but it is not required.
    - Reminder: Incentive funds are subject to change without notice. Check the announcements on <https://efficiencyworks.org/> for recent program changes or contact Efficiency Works for more information prior to finalizing proposals and signing contracts to ensure accurate program expectations.

- c. Customer and SP enter into a contract for the study work and the customer signs the BPS compliance study incentive agreement.
- 3. SP submits for incentive pre-approval.
  - a. SP submits an online application via their service provider portal.
  - b. If the project meets program rules, a pre-approval code will be issued reserving rebate funds, usually within 5 business days.
  - c. Program incentive funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
- 4. SP completes the BPS compliance study assessment and presents findings to the customer.
  - a. SP requests building data from the customer and the customer provides data in a timely manner.
  - b. SP then works with building data and the customer to complete the analysis and generate the study report.
  - c. SP presents the findings of the report to the customer and delivers the final report electronically.
  - d. Customer signs the BPS compliance study Incentive Completion Terms and Conditions.
  - e. Document and inform Efficiency Works of any changes to the project scope that may impact the final study incentive amount such as changes to building information or study cost. There is no guarantee that incentive amounts will increase based on project scope changes after pre-approval is issued.
- 5. SP submits final paperwork via the pre-approved online application.
  - a. Submit the final incentive application with all required documentation within 45 days of the study completion date.
  - b. A final invoice is required at final submittal and must contain the following information at a minimum:
    - i. Assessment site address
    - ii. Reference to the scope of work completed
    - iii. Total project cost. If the SP is receiving the incentive, the exact incentive amount must be shown as deducted from the total project cost.
  - c. Program incentive funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests prior to final submission shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
- 6. Receive incentive payment.
  - a. Rebate payment can be sent to any of the following:
    - i. The customer



- ii. The SP completing the study
  - iii. A 3<sup>rd</sup> party
- b. Rebate applications are typically processed and paid within 4-6 weeks of submittal.
- c. Payments are made by physical check and can be mailed to any location in the United States.

## BPS Compliance Study FAQs

### **Q: What is included in a BPS compliance study report?**

Through the Efficiency Works study programs, qualifying SPs will provide a comprehensive BPS compliance assessment for eligible customer buildings. The assessment will include the following at minimum:

- Estimated upgrade costs and simple payback calculations
- Estimated Energy Use Intensity (EUI) impact for each measure
- Estimated emissions impact (GHGI) for each measure
- Ideal compliance path specific to customer opportunity
- Recommendations for any target adjustments necessary for compliance
- Outlined path to compliance

A BPS compliance study report offers an in-depth analysis of a customer's building efficiency by providing insights into potential financial impacts and emission reductions. Participants can expect a customized, comprehensive report, and a summary of available financial assistance resources to offset the upfront capital costs.

### **Q: Who qualifies for the Efficiency Works BPS compliance study incentive?**

The following criteria shall be met at a minimum to participate:

1. The building is a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. The building is subject to the State of Colorado BPS requirements.
3. The building is existing and complete, not under construction or planned to be constructed.
4. Participant has the legal right and authority to install equipment and perform maintenance work on the building.
5. Participant agrees to share the final study report with Efficiency Works.

### **Q: Is there a requirement around the building size?**

The building must be subject to the State of Colorado BPS requirements, which affects buildings of 50,000 square feet and larger.

**Q: What do the program's incentives cover?**

The incentive can cover up to the total project cost of a qualifying BPS compliance study. Efficiency Works offers different incentives and bonus amounts based on the size of the building, the BPS statute it is subject to, and other qualifications. The customer may be eligible for the incentive amounts shown in the "BPS Compliance Study customer participation and eligibility criteria" section above, up to 100% of the study cost.

**Q: Are incentives bill credits or cash payouts?**

Incentives can only be paid via a physical check mailed to the recipient.

**Q: Do customers need to use specific vendors for performing a BPS compliance study?**

Yes, an approved list of BPS compliance study service providers is published on the Efficiency Works website here: <https://efficiencyworks.my.site.com/tradeally/s/findtradeally>. Studies completed by vendors that are not listed with the BPS compliance study specialty on this page are not eligible for incentives.

**Q: Are other funding sources available to cover the costs of upgrades to bring the building into BPS compliance?**

Yes, Efficiency Works offers incentives for custom process electrification, energy efficiency retrofits, enhanced HVAC maintenance, and more. To learn more about our full portfolio of incentives and other offerings, please visit: <https://efficiencyworks.org/business/>.

**Q: Do any other grants, rebates or funding programs work with the BPS compliance study incentive?**

Yes, other state and/or federal incentive programs are fully stackable with Efficiency Works incentives. A list of additional funding resources will be provided with the study.

**Q: Do I have to make any financial commitments to participate in the BPS compliance study incentive?**

The cost of the study can be offset up to 100% by the incentive. Exact financial commitments beyond the incentive will be dependent upon the cost of the study from the service provider and the proposal that customers will select. Participants are NOT required to make any upgrades or purchases recommended through the study.

**Q: How long does the BPS compliance study process take?**

Following the completion of the preapproval application, a BPS compliance study process may take approximately 3 to 6 months.

**Q: Who do I contact with additional questions?**

Efficiency Works Business program staff can be reached during regular business hours via phone at (970) 229-4823 or via email at [business@efficiencyworks.org](mailto:business@efficiencyworks.org).

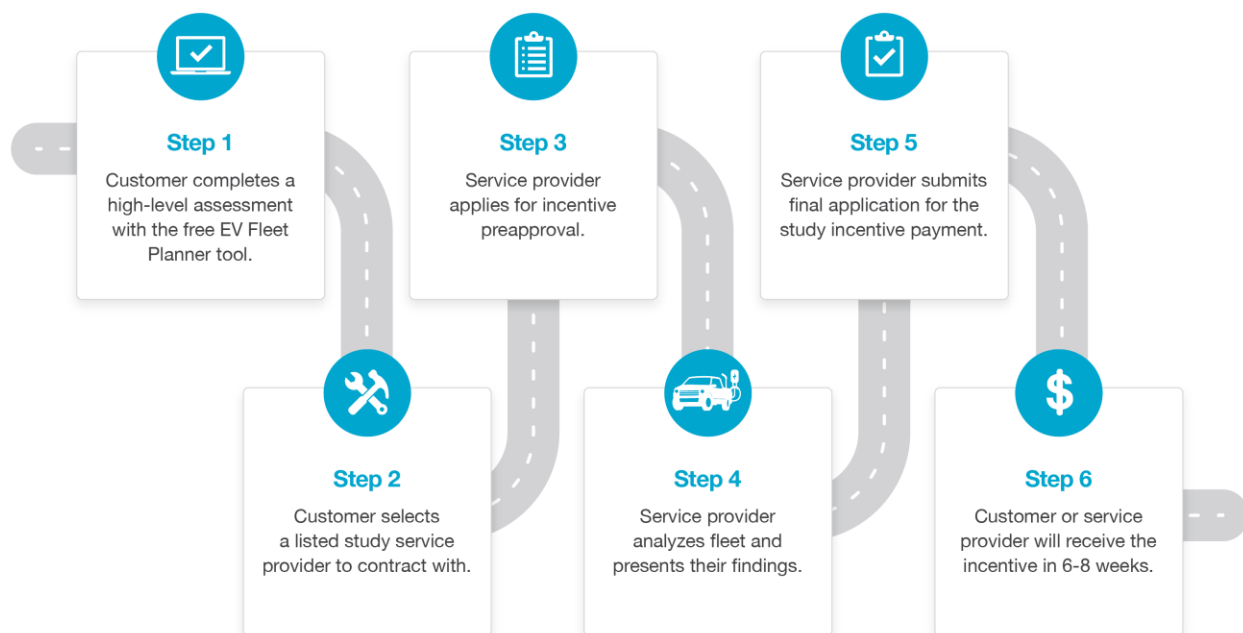
**Q: What are the next steps for customers interested in a BPS compliance study?**

Customers can reach out to a qualified Building and Process Electrification Study service provider listed on the Efficiency Works website to begin the study process. Customers can also contact Efficiency Works Business to request information about next steps. Visit the Efficiency Works Business Study Programs website for more information at <https://efficiencyworks.org>.

## Efficiency Works Fleet Electrification Study Incentives

The Efficiency Works Business fleet electrification study incentive is part of the Efficiency Works portfolio, offering versatile support solutions and information for commercial fleet electrification. The program's intent is to provide quality, customizable information for customers exploring the transition to electric vehicles, focusing on financial and environmental impacts to help customers make informed and actionable decisions about the future of their fleets.

The fleet electrification study incentive uses a network of Efficiency Works listed service providers (SPs) to conduct electrification assessments for eligible customer fleets. When participating in a fleet electrification assessment with a listed SP through the program, Efficiency Works Business offers an incentive intended to offset some or all of the study's cost. Incentive amounts are based on customer fleet vehicle makeup as outlined in the incentives section of this guide. Assessment categories include light duty vehicles, medium to heavy duty vehicles and non-road equipment. The graphic below shows the fleet electrification study incentive process overview for customers and SPs.



### Fleet electrification study incentive customer participation and eligibility criteria

Customers interested in receiving a fleet assessment will participate in the incentive with the support of their selected SP. Customers are required to utilize a vetted Fleet Electrification Study provider from the Efficiency Works [“Find a Service Provider”](#) page. Assessments completed by vendors not on this list or customer self-assessments will not be eligible for fleet electrification study incentives. **In reviewing project applications, Efficiency Works will identify evidence that a fleet dwells at the project location and that a fleet electrification study would aid in long term fleet planning around potential electrification. The following criteria shall be met at a minimum to participate:**

1. The dwell location of the fleet vehicles is a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
2. Participants have the legal right and authority to install electric equipment at the place(s) of business identified on the incentive application.
3. Participants lease or own equipment or vehicles that dwell within the respective municipal utility service area. Equipment shipped to other facilities outside the service area do not qualify. The assessment may take vehicles or equipment outside the territory into account, but incentive eligibility will be based on equipment and vehicles in the service area only.
4. It is expected that customers perform a simple electrification self-assessment for their fleet using Efficiency Works' free EV Fleet Planner tool provided online before pursuing an in-depth study through the fleet electrification study incentive. Basic fleet detail inputs required in the online fleet planner tool include zip code, vehicle type and quantities, mileage per day and operating schedule. The output of the planner tool includes but is not limited to lifetime cost and GHG savings, annual fuel savings, and available incentives. The EV Fleet Planner tool report can be printed for reference or shared with qualified Fleet Electrification Study service providers electronically if a more in-depth study is necessary to help customers make informed and actionable decisions about the future of their fleets. This free EV Fleet Planner tool can be found at the following link:  
<https://evfleet.efficiencyworks.org/onboarding/intro>

**In addition to meeting the minimum criteria above, the following factors will also be considered in the fleet eligibility screening:**

- The fleet should have accessible and up-to-date fleet-usage trending data and records (preferred).
- The fleet usage should not be planned to be reduced in the next 12 months and any planned growth in the next 12 months should be able to be described for consideration during the study.
- New fleets are eligible for the program after 1 year of operation if all the above criteria are met. Fleets that have undergone a major usage change are eligible after 6 months of operation if all the above criteria are met.
- Locations and fleets that have previously undergone a fleet electrification study within the Efficiency Works Business Study Incentives Program may be eligible for repeat participation but must meet certain criteria to ensure the study will provide new learning not included in the original study:
  - The fleet should have completed its initial fleet electrification study at least five years prior to the application for another study. This timeline allows for sufficient time to implement previous recommendations and observe their impact.

- The fleet's usage or size data should indicate a notable increase in operations since the initial fleet electrification study. This deviation signals the potential for new opportunities. Trend data must be provided at the time of preapproval.
- Significant changes in fleet use, driving patterns, or major growth may warrant a reevaluation through a subsequent fleet electrification study.

**Project definition:** A standard project is defined as a contiguous building with more than one commercial fleet vehicle that dwells at the site if all the above criteria are met. In some instances, a non-standard project may be considered for eligibility, for example:

- A fleet may justify being approached in multiple phases or projects if the fleet dwells at one location but operates as varied fleet usage (i.e., last mile delivery vs. non-road vehicles) and/or has a central dwelling location but other remote sites where vehicles may dwell that are also eligible. Projects are not defined by the electric meter and any facility with more than one electric meter is not automatically eligible for more than one study incentive.
- More than one facility with similar fleet make-up, use cases, and usage, owned or operated by the same participant may be bundled together to meet the eligibility requirements.

It is required that requests for non-standard projects are communicated to the Efficiency Works Business team prior to the participant entering a contract with a service provider. Additional documentation to outline the justification for a non-standard project must be provided for review. To initiate a non-standard review, complete a draft project application and email the Efficiency Works Business team describing the nature of the request and include any relevant documentation to support the justification. Approval for non-standard projects will occur via email prior to project application submission so accurate project scope discussions can be had with the participant prior to them signing the incentive agreement. Any non-standard projects are considered ineligible until express written permission is given by the Efficiency Works Business team.

### **Participant definition:**

For the purposes of the Efficiency Works energy efficiency programs, a participant is defined as a company or organization that is taking ownership and responsibility for the site, fleet and project, and receives commercial electric service from one of the following utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications or Loveland Water and Power. A participant may be a holder of a single account, multiple accounts in aggregate or corporate accounts. For participants with multiple facilities, eligibility will be evaluated on a site-by-site basis depending on each project scope and program budget. Participants with one or more sites can participate in multiple Efficiency Works projects and programs but will be subject to any applicable participant incentive caps.



## Eligibility and final approval:

Efficiency Works retains the right to make final determination of participant and project eligibility for standard and non-standard projects. All projects and scopes require preapproval before any funds are committed. The Efficiency Works Business team will work with the SP and participant to define the fleet characteristics prior to issuing a final decision on eligibility.

Customers can find qualified listed Fleet Electrification Study providers on the Efficiency Works “Find a Service Provider” page. The Efficiency Works SPs in this database have demonstrated their interest and ability in helping customers complete fleet electrification assessments. Customers are encouraged to solicit two or more bids and should ensure that SPs have insurance coverage in the types and amounts appropriate for the projects being completed.

## Fleet assessment services and incentives

Through the fleet electrification study incentive, qualifying SPs will provide a comprehensive end-to-end electrification assessment for eligible customer fleets. The assessment will aim to identify opportunities to electrify fleet vehicles and help customers understand the associated charging requirements and environmental impacts of electrification. The assessment will evaluate a participant’s vehicle fleet and determine the cost-effectiveness of replacing vehicles with electrified alternatives. Assessments will also include an emissions analysis that will help participants understand the environmental impacts of fleet electrification.

With the understanding that fleet size can vary by duty type, Efficiency Works provides three (3) tiers of incentives based on the vehicle make-up of the fleet. The customer may be eligible for the highest incentive available based on duty type quantities entered on the incentive pre-approval application up to 100% of study cost. For example, a fleet with 25 light-duty vehicles and 10 medium-duty vehicles would qualify for both Tier 1 and Tier 2, pushing them into the higher Tier 2 up to the total study cost. Efficiency Works has the right to modify incentive amounts per assessment at any time if actual results show the incentive is too high or low.

Vehicle classification*	Tier 1	Tier 2	Tier 3
Light-duty vehicles (LDVs) or non-road equipment**	Up to 25 LDVs	26-100 LDVs	101+ LDVs
Medium and heavy-duty vehicles (MHDVs)	Up to 5 MHDVs	6-12 MHDVs	13+ MHDVs
Incentive per assessment	\$15,000	\$20,000	\$30,000

*\*This table defines the fleet assessment incentives that are available for different fleet sizes. Light Duty Vehicles are defined as any vehicles weighing under 10,000 lbs. and includes any non-road equipment. Medium Duty Vehicles are defined as vehicles that weigh 10,001 – 19,500 lbs. Heavy Duty Vehicles are defined as vehicles that weigh from 19,501 – 26,000 lbs. Definitions pulled from Alternative Fuels Data Center.*

*\*\*Non-road equipment encompasses golf carts, ATVs, floor sweepers/scrubbers, forklifts, mowers, backhoes, and others.*

SPs must complete an online pre-approval application and receive approval confirmation from Efficiency Works Business before conducting a customer assessment. Assessments that do not receive pre-approval confirmation will be ineligible for incentives. The pre-approval application includes uploading a project proposal and incentive agreement form signed by the customer.

This will allow the program to confirm budget availability and reserve funds for the scheduled assessment(s). See the Funding Availability section at the beginning of this guide for more information.

Examples of customer information required at incentive pre-approval is listed below:

- Customer vehicle dwelling site and mailing address
- Alternate vehicle dwelling or charging sites (if necessary)
- Incentive payee (may be paid to customer, SP or 3<sup>rd</sup> party)
- Electric utility
- Building type and business annual operating hours
- Total estimated study cost as provided to the customer
- Estimated study completion date
- Primary fleet function
- Quantity of light-duty, non-road, medium-duty and/or heavy-duty vehicles
- Quantity of electric vehicles already in fleet
- Quantity of electric vehicle supply equipment already in use
- A signed Fleet Electrification Study Incentive Agreement (reference version available in Appendix A)
- A proposal outlining the study site address, scope and cost

After the fleet electrification study is complete and presented to the customer, the SP may submit the final application documents and request for incentive payment. Examples of information required at final incentive submittal is listed below:

- Documents:
  - Final report
  - Supplemental data
  - Final invoice with incentive deducted from the cost if SP is payee
  - Signed agreement confirming the study was delivered, Fleet Electrification Incentive Completion Terms and Conditions referenced in Appendix B
- Specific fields that are required on the online application:
  - Total cost of ownership
  - Simple payback
  - Estimated emissions impact [MTCO<sub>2</sub> equivalents]
  - Estimated infrastructure / EVSE costs
  - Estimated electric vehicle costs
  - Quantity of Level 2 EVSE charging ports required
  - Quantity of Level 3 EVSE charging ports required
  - Energy impact [kWh] (The amount of energy required to replace the selected fleet of ICE vehicles one-to-one with electric vehicles)
  - Demand impact [kW] (The amount of demand required to replace the selected fleet of ICE vehicles one-to-one with electric vehicles)
  - Is it anticipated that electric service upgrade is needed?
  - Estimated customer interest

- Estimated EV transition timeline

## Fleet electrification study incentive process and payment

The following steps represent the full process of participation in the fleet electrification study incentive:

1. Customer completes a fleet self-assessment using the free [EV Fleet Planner tool](#) and decides a more in-depth study is of interest and would aid in the fleet planning process.
2. Customer begins the process of determining program and SP eligibility.
  - a. Determine eligibility, see Customer Eligibility section
  - b. Solicit study bids from and select a listed Fleet Electrification Study service provider (SP) to perform the study through the program. It is recommended to collect three bids, but it is not required.
    - Reminder: Incentive funds are subject to change without notice. Check the announcements on <https://efficiencyworks.org/> for recent program changes or contact Efficiency Works for more information prior to finalizing proposals and signing contracts to ensure accurate program expectations.
  - c. Customer and SP enter into a contract for the study work and the customer signs the Fleet Electrification Study Incentive Agreement.
3. SP submits for incentive pre-approval.
  - a. SP submits an online application via their service provider portal.
  - b. If the project meets program rules, a pre-approval code will be issued reserving rebate funds, usually within 5 business days.
  - c. Program rebate funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
4. SP completes the fleet assessment and presents findings to the customer.
  - a. SP requests fleet data from the customer and the customer provides data in a timely manner.
  - b. SP then works with fleet data and the customer to complete the fleet analysis and generate the study report.
  - c. SP presents the findings of the report to the customer and delivers the final report electronically.
  - d. Customer signs the Fleet Electrification Incentive Completion Terms and Conditions.
  - e. Document and inform Efficiency Works of any changes to the project scope that may impact the final study incentive amount such as changes to fleet vehicle quantities or study cost. There is no guarantee that incentive amounts will increase based on project scope changes after pre-approval is issued.
5. SP submits final paperwork via the pre-approved online application.

- a. Submit the final incentive application with all required documentation within 45 days of the study completion date.
  - b. A final invoice is required at final submittal and must contain the following information at a minimum:
    - iv. Assessment site address
    - v. Reference to the scope of work completed
    - vi. Total project cost. If the SP is receiving the incentive, the exact incentive amount must be shown as deducted from the total project cost.
  - c. Program rebate funds will be reserved for up to 45 days beyond the expected study completion date listed in the approved rebate application upon pre-approval. Extension of the project completion date may be granted, subject to available budgets and Efficiency Works staff approval. Extension requests prior to final submission shall be submitted in writing and with as much advance notice as possible. Approvals, if granted, will be provided in writing.
6. Receive incentive payment.
- a. Rebate payment can be sent to any of the following:
    - i. The customer
    - ii. The SP completing the study
    - iii. A 3<sup>rd</sup> party
  - b. Rebate applications are typically processed and paid within 4-6 weeks of submittal.
  - c. Payments are made by physical check and can be mailed to any location in the United States.

## Fleet electrification study incentives FAQs

### **Q: What is included in a fleet assessment report?**

A fleet assessment offers an in-depth analysis of a customer's fleet by providing insights into potential financial benefits and emission reductions from replacing the fleet's internal combustion engine (ICE) vehicles with electric vehicles (EVs). Participants can expect a customized, comprehensive report, and a summary of available financial assistance resources to offset the upfront capital cost of switching from ICE vehicles to EVs.

### **Q: Who qualifies for the Efficiency Works Fleet Electrification Study Incentive?**

To be eligible to participate, customers must:

- 6. Be a commercial electric customer of one of the following municipal utilities:
  - a. Estes Park Power and Communications
  - b. Fort Collins Utilities
  - c. Longmont Power & Communications
  - d. Loveland Water and Power
- 7. Have the legal right and authority to install electric equipment at the place(s) of business identified on the incentive application.
- 8. Lease or own equipment or vehicles that dwell within the respective municipal utility service area. Equipment shipped to other facilities outside the service area do not

qualify. The assessment may take vehicles or equipment outside the territory into account, but incentive eligibility will be based on equipment and vehicles in the service area only.

9. It is expected that customers perform a simple fleet electrification self-assessment for their site using Efficiency Works' free EV Fleet Planner tool provided online before pursuing an in-depth study through the Fleet Electrification Study Incentive. This free EV Fleet Planner tool can be found at the following link:

<https://evfleet.efficiencyworks.org/onboarding/intro>

**Q: Is there a requirement around the number of vehicles per fleet?**

Your organization must have a minimum of one light, medium, or heavy-duty fleet vehicle. You may choose to electrify all or part of your fleet vehicles/non-road equipment.

**Q: What do the program's incentives cover?**

A financial incentive will be paid to participants to cover up to the entire cost of the fleet assessment. The amount of the incentive will vary by fleet size and is paid per assessment. Depending on the listed service provider (SP) selected, the incentive amount may or may not cover the entirety of the fleet assessment.

**Q: Are incentives bill credits or cash payouts?**

Incentives are paid in cash via a physical check mailed to the recipient.

**Q: Do customers need to use specific vendors for performing fleet assessment service?**

Yes, an approved list of Fleet Electrification Study SPs is published on the Efficiency Works website here: <https://efficiencyworks.my.site.com/tradeally/s/findtradeally>. Studies completed by vendors not on the Efficiency Works listed service provider page with the fleet electrification specialty are not eligible for incentives.

**Q: Is there a way to address vehicles with additional needs such as storm response in a fleet assessment?**

Yes, the capabilities might vary slightly by SP, but in most unique circumstances a SP should be able to handle your specific needs. The SP that the customer selects will need to be given information about which vehicles have those nuanced responsibilities and how much additional range they need. All vehicles with unique use cases can be assessed, but that does not mean that all vehicles will have an EV equivalent on the market that can meet unique needs.

**Q: Are other funding sources available to cover the costs of an EV or electric vehicle supply equipment (EVSE)?**

Currently, Efficiency Works only offers incentives for fleet assessment services, it does not offer any funding for EV or EVSE purchases that are not publicly available. However, the fleet assessment will highlight federal, state, and local funding opportunities that are available to the

fleet that is participating. Efficiency Works does offer incentives for publicly available level 2 EVSE. Please refer to the [Efficiency Works](#) website for up-to-date program offerings.

**Q: Do any other grants, rebates or funding programs work with the Fleet Electrification Study Incentive?**

Yes, state and/or federal fleet electrification incentive programs are fully stackable with Efficiency Works incentives. A list of additional funding resources will be provided with the assessment.

**Q: Do I have to make any financial commitments to participate in the Fleet Electrification Study Incentive?**

The cost of a fleet electrification study is offset partly by the program's three incentive tiers. Exact financial commitments are dependent on the SP and the proposal that customers will select. Participants are NOT required to purchase any of the vehicles, infrastructure upgrades, or charging equipment recommended through the study.

**Q: How long does the fleet electrification study process take?**

Following the completion of the program application, the fleet assessment process takes approximately 3 to 6 months.

**Q: Who do I contact with additional questions?**

Efficiency Works Business program staff can be reached during regular business hours via phone at (970) 229-4823 or via email at [business@efficiencyworks.org](mailto:business@efficiencyworks.org).

**Q: What are the next steps for customers interested in a fleet assessment?**

Interested customers should perform a simple fleet electrification self-assessment for their site using Efficiency Works' free EV Fleet Planner tool provided online before pursuing an in-depth study through the fleet electrification study incentive. If a more in-depth study is necessary to help customers make informed and actionable decisions about the future of their fleets, customers can reach out to a qualified Fleet Electrification Study SP listed on the Efficiency Works website to begin the study process. Customers can also contact Efficiency Works Business to request information about next steps. Visit the Efficiency Works website for more information at <https://efficiencyworks.org>.



## Efficiency Works Business Study Incentives listed service provider requirements and qualifications

The Efficiency Works Business Study Incentives program utilizes a curated group of Efficiency Works approved third-party vendors known as listed service providers (SPs) that conduct the studies for qualifying utility customers. SPs participating in this program must be listed through the general Efficiency Works program, as well as undergo additional vetting and training to be listed to participate in each of the study incentives. Each study incentive has its own listing requirements and service providers must request to be evaluated for each study incentive of interest.

### General service provider listing process

Efficiency Works has initial requirements for any vendors to be listed SPs, regardless of the program they support:

1. Complete an online application at <https://efficiencyworks.org/service-providers/>
  - a. Upload a certificate of liability insurance listing Platte River Power Authority as the Certificate Holder and Additional Insured
  - b. Upload a signed and dated W-9
  - c. Sign the Efficiency Works service provider terms and conditions
2. Attend an Efficiency Works Business training
  - a. Efficiency Works Business provides technical training events on a wide range of topics
  - b. At least one training event must be attended annually
  - c. 1-on-1 training is available
3. Complete a minimum of 1 project per calendar year
4. Consistently pass inspections
5. Uphold the ethics requirements in the service provider application and agreement
6. Renew the service provider application every 2 years
7. Maintain general liability insurance policy according to program requirements

SPs may be removed from the program at Efficiency Works' discretion. Examples of activities that will lead to removal include, but are not limited to:

- Failure to meet project timelines
- Poor quality deliverables
- False representation or marketing of the program to Efficiency Works and utility customers
- Failure to maintain required documentation to be a listed Efficiency Works SP

### Additional requirements for building and process electrification (BPE) study incentive participation

Once enrolled as an Efficiency Works listed service provider (SP), SPs seeking to participate in the building and process electrification (BPE) study incentive must then also meet the additional

requirements stipulated below in order to conduct an assessment through the study program. SPs can become listed to perform BPE studies at any time throughout the program year, and they may also be removed if they fail to meet the guidelines.

- Complete a virtual training with Efficiency Works Business staff that outlines expectations of the program and how to complete online incentive applications.
- Have prior experience with electrification evaluation.
- Demonstrate the ability to conduct in-person visits.
- Maintain a customer contact log or pipeline of active and completed assessments for reporting to Efficiency Works.
- Demonstrate a turn-key solution that includes a report. Deliverables must include at minimum:
  - Written report
  - Supplemental data file
- Provide a positive customer journey that accomplishes the steps outlined below. The customer journey might differ slightly between SPs but will include the below steps at a minimum:
  - Conduct intake call and provide customer with a study proposal
  - Receive building energy use data from customer (documentation of this customer transaction required)
  - Conduct assessment and analysis
  - Conduct final presentation to the customer and allow time for adequate feedback or questions (documentation of this customer transaction required). The final presentation shall include:
    - Qualitative discussion of whether each electrification measure would require upgrading building-level electrical infrastructure (panels, wiring, switchboards, etc.)
    - Qualitative discussion of whether full electrification would require utility electrical infrastructure upgrades.
    - Other significant energy conservation measures identified to help reduce load or pair with electrification recommendation
    - Potential utility, government, or tax incentives to offset costs or study and/or new equipment.
  - Deliver the final report
- Be able to provide the below features of an assessment at minimum:
  - Estimated upgrade costs and simple payback calculations
  - Estimated Energy Use Intensity (EUI) impact for each measure
  - Estimated emissions impact (e.g., MTCO<sub>2</sub>e or GHGI) for each measure

### Additional requirements for Building Performance Standards (BPS) compliance study incentive participation

Once enrolled as an Efficiency Works listed SP, SPs seeking to participate in the BPS compliance study incentive must then also meet the additional requirements stipulated below in order to conduct an assessment through the study program. SPs can become listed to perform

BPS compliance studies at any time throughout the program year, and they may also be removed if they fail to meet the guidelines.

- Complete a short virtual training with Efficiency Works Business staff that outlines expectations of the program and how to complete online incentive applications.
- Have prior experience with building energy use assessment implementation.
- Demonstrate the ability to conduct in-person visits.
- Maintain a customer contact log or pipeline of active and completed assessments for reporting to Efficiency Works.
- Demonstrate a turn-key solution that includes a report assessing potential paths to BPS compliance for the customer building. Deliverables must include at minimum:
  - Written report
  - Supplemental data file
- Provide a positive customer journey that accomplishes the steps outlined below. The customer journey might differ slightly between SPs but will include the below steps at a minimum:
  - Conduct intake call and provide customer with a study proposal
  - Receive building energy use data from customer (documentation of this customer transaction required)
  - Conduct assessment and analysis
  - Conduct final presentation to the customer and allow time for adequate feedback or questions (documentation of this customer transaction required)
  - Deliver the final report
- Be able to provide the below features of an assessment at minimum:
  - Estimated upgrade costs and simple payback calculations
  - Estimated Energy Use Intensity (EUI) impact for each measure
  - Estimated emissions impact (GHGI) for each measure
  - Ideal compliance path specific to customer opportunity
  - Recommendations for any target adjustments necessary for compliance
  - Outlined path to compliance

### Additional requirements for fleet electrification study (FE) participation

Once enrolled as an Efficiency Works listed SP, SPs seeking to participate in FE study incentives must then also meet the additional requirements stipulated below in order to conduct a fleet assessment. SPs can become listed to perform FE studies at any time throughout the program year, and they may also be removed if they fail to meet the guidelines.

- Complete a short virtual training with Efficiency Works Business staff that outlines expectations of the program and how to complete online incentive applications.
- Have prior experience with fleet assessment implementation.
- Demonstrate the ability to conduct in-person visits if necessary.
- Maintain a customer contact log or pipeline of active and completed assessments for reporting to Efficiency Works.

- Demonstrate a turn-key solution that includes a report that assesses electrification potential for individual vehicles within a fleet. Deliverables must include at minimum:
  - Written report
  - Supplemental data file
- Provide a positive customer journey that accomplishes the steps outlined below. The customer journey might differ slightly between SPs but will include the below steps at a minimum:
  - Conduct intake call and provide customer with a study proposal
  - Receive accurate fleet data from customer (documentation of this customer transaction required)
  - Conduct fleet analysis
  - Conduct final presentation to the customer and allow time for adequate feedback or questions (documentation of this customer transaction required)
  - Deliver the final report
- Be able to provide the below features of an assessment at minimum:
  - Total cost of ownership models for the current and proposed electrification solution(s)
  - Simple payback calculations
  - Estimated emissions impact of the proposed electrification solution(s)
  - Share a list of additional funding opportunities the customer may be eligible for (list provided by Efficiency Works)
  - Multiple options for vehicle recommendations that fulfill the use case of the existing vehicle
  - Ability to accommodate customer goals in analysis, GHG reductions, percentage of fleet electrified, etc.

## Efficiency Works Business Study Incentives Program marketing and participant communication

SPs play a critical role in identifying viable Efficiency Works Business Study Incentives project opportunities and facilitating the participant application process. While the intent of this study incentive is for all customers to be eligible to participate, Efficiency Works reserves the right to deny a preapproval based on preapproval requirements not being met. Extreme care must be taken to avoid creating false participant expectations and dissatisfaction with the process or Efficiency Works. Therefore, SPs are responsible for understanding the entire suite of energy program options available within the Efficiency Works portfolio and should work with program staff to determine which program is best suited for each participant. Efficiency Works will provide education and training to SPs on a regular basis to help meet this objective. It is the intent of Efficiency Works that participants are encouraged to participate in the program offering that best suits the needs of their facility.

During the process of completing a project under the Efficiency Works Business Study Incentives Program, SPs are encouraged to contact the designated participant contact as necessary to coordinate activities and information exchange. However, all written and electronic


correspondence pertaining to the program between the participant and the SP must include Efficiency Works on the distribution list. Participants should also work with their utility account managers, if desired, and provide the same access to correspondence.



## Appendix A Study Incentive Agreements

### A1. Building and Process Electrification Study Incentive Agreement

The agreement shown on the next 3 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).

  
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#### Building & Process Electrification (BPE) study incentive agreement form

**Instructions:** This agreement must be read and signed by the Participant after the qualified BPE service provider (SP) is selected and prior to work being performed. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.

BPE study service provider:	
Cost of study*:	
Tier:	
Completion date:	

Tier	Description	Incentive
Tier 1	Building only	\$15,000
Tier 2	Building and process	\$25,000

\*The study cost can be covered by Efficiency Works up to \$15,000 for Tier 1 studies and \$25,000 for Tier 2 studies. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.

#### Terms and conditions

Participant acknowledges that the Efficiency Works program ("Program") is a partnership between Platte River Power Authority ("Platte River") and its owner communities of the Town of Estes Park, the City of Fort Collins, the City of Longmont and the City of Loveland (the "Owner Communities"). Platte River manages the Program. By participating in the Program, you acknowledge and agree that your customer data may be shared among the Owner Communities and third-party Program implementors for a variety of purposes. Participant data may include, but is not limited to, name, address, contact information, account number, utility usage data as well as details regarding your participation in the Program or other programs and services offered by Platte River or the Owner Communities. These details may include, but are not limited to, study results, rebate amounts, and products purchased related to participation. Purposes for which your customer data may be shared or used include, but are not limited to, determining your eligibility for the Program, program administration, marketing, quality control, providing you with products or services you request, offering you products or services that may be of interest to you, or analyzing your utility usage. Platte River and the Owner Communities may not have control over your customer data and cannot guarantee that it will remain confidential. You acknowledge that you are the owner of the property receiving Program services, or are otherwise eligible to receive program services, and that you are authorized to consent to the disclosure of the data as specified in this form.

- To qualify for the Program the proposed facility must:
  - Facility is an existing commercial building served by one of the four following electric utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications, or Loveland Water and Power.
  - Abide by the Program rules and eligibility requirements in effect on the date of the submitted project application.
  - Obtain project pre-approval from Platte River prior to the study being performed.
  - Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.
  - Unless otherwise approved by Platte River, participant shall work with an approved SP to perform the qualified study.
  - Projects will be pre-approved or qualified on a case by case basis and are at the discretion of Platte River.
  - Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.
  - If the Participant chooses to not continue the project after preapproval, the Participant will not be eligible to receive a rebate from Platte River. The Participant will reimburse the SP for the services provided pro rata to the project termination date, or as otherwise set forth in the Participant's contract with the SP. Failure to provide information necessary for the SP to complete the study to the SP within 3 months of preapproval will be considered as the participant choosing not to continue the project.
  - Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.
  - For the purposes of Platte River's distributed energy solutions programs, a Participant is defined as a company or organization that receives electric service from one of Platte River's Owner Communities under an

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- approved municipal rate schedule. A Participant is a holder of a single account, multiple accounts in aggregate or corporate accounts. Multiple accounts or corporate accounts with a single municipal customer identification number will be considered a single Participant. An organization of this type can participate in multiple programs but will be subject to any applicable customer rebate caps. Platte River retains the right to make final determination of Participant eligibility.
9. Platte River may submit to Participant the name(s) and address(es) of the SP that Platte River identifies through a selection process to provide the technical support services if the project application is approved. The final decision to proceed under the Program and use of such persons will be subject to the approval of the Participant.
  10. Participant shall enter into a contractual legal agreement with the selected SP for fleet electrification study services described in the Program guide and other services to be performed at the request of the Participant.
  11. Participant agrees to require its employees, design team, and contractors to cooperate with Platte River and the SP to provide fleet operating data and energy use evaluation assistance needed by Platte River for participation in the Program, including cooperation in gathering electricity bills and releasing information to necessary parties in the Program.
  12. Platte River reserves the right to inspect the facility for compliance with the Program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the study is found to be in compliance with the Program requirements, the rebate will be paid otherwise the Participant will be notified.
  13. Platte River and SPs shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to hazardous materials of any kind in connection with the facility including, but not limited to, asbestos, asbestos products, PCBs, or other toxic substances. Participant is required to notify Platte River, SP, and other sub-contractors if hazardous materials exist prior to work being performed.
  14. Program procedures, requirements, and rebate levels are subject to change or cancellation without notice.
  15. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.
  16. Participation as a SP does not constitute an endorsement by Platte River, nor does it certify or guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the Program.
  17. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and may be supplemented only by the execution of the completion terms and conditions (Addendum #1), and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this program or its terms and conditions at any time.
  18. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising directly or indirectly, in whole or in part, out of participation in the Program, the performance of the study, or the provision of assistance and incentives by Platte River related to the Program.
  19. Rebate funds will be reserved for no more than 45 days beyond the estimated completion date listed in this agreement. Participant shall notify Platte River immediately if completion of the project is expected to be delayed beyond this time. Platte River will seek to provide funds for projects that are delayed, provided such funds are available, but is under no obligation to do so.
  20. Participant shall require that all parties, contractors, or subcontractors implementing the proposals and/or completing the study that are the subject of this agreement maintain comprehensive general liability insurance in amounts not less than \$500,000 each person \$1,000,000 each occurrence for bodily injury, and \$500,000 each occurrence \$1,000,000 in aggregate for property damage. If the Participant is implementing the proposals and/or installing the measures, the Participant shall maintain insurance in the amounts specified herein.
  21. The Participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for study.
  22. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency, electrification, or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.
  23. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.





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24. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.
25. These Terms and Conditions, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.
26. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially)

taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

By signing below, Participant acknowledge and agree that they have read, understand and agree to be bound by the terms and conditions set forth in this agreement, and to the customer eligibility, study eligibility and participation procedures for the Program in the Program guide as amended from time to time. The Participant further certify that all of the information contained within this application is true and factual.

#### Participant

Signature:

Name:

Title:

Company:

Date:

Address:

City, state, zip:

Phone:

#### Required – Authorization to alternate recipient

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:

Name:

Title:

Date:

Company:


#### Required – Alternate incentive payment recipient (typically registered service provider)

An IRS Form W-9 for the company named below must be submitted before payment can be made.

Company:

## A2. Building Performance Standards Compliance Study Incentive Agreement

The agreement shown on the next 3 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).



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### Building Performance Standards (BPS) Compliance study incentive agreement form

**Instructions:** This agreement must be read and signed by the Participant after the qualified BPS compliance service provider (SP) is selected and prior to work being performed. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.

BPS Compliance study service provider:	
Cost of study*:	
Bonuses:	
Completion date:	

Offering	Eligibility	Incentive
Building Performance Standards Compliance Study Incentive	Buildings greater than or equal to 50,000 sq. ft. subject to the State of Colorado BPS, with commercial electric service from a qualifying electric utility listed in Item 1A.	\$15,000
Building Performance Standards Bonus	All requirements of the BPS study incentive, plus eligibility requirements outlined in the BPS bonus application. Not available to Estes Park Power & Communications customers.	\$5,000
Electrification study focus bonus	All requirements of the BPS study incentive, plus electrification study	\$5,000

\*The study cost can be covered by Efficiency Works up to \$15,000 for standard BPS compliance study, \$20,000 for studies eligible for the BPS bonus or the electrification study focus bonus, or \$5,000 for studies eligible for both bonuses. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.

#### Terms and conditions

Participant acknowledges that the Efficiency Works program ("Program") is a partnership between Platte River Power Authority ("Platte River") and its owner communities of the Town of Estes Park, the City of Fort Collins, the City of Longmont and the City of Loveland (the "Owner Communities"). Platte River manages the Program. By participating in the Program, you acknowledge and agree that your customer data may be shared among the Owner Communities and third-party Program implementors for a variety of purposes. Participant data may include, but is not limited to, name, address, contact information, account number, utility usage data as well as details regarding your participation in the Program or other programs and services offered by Platte River or the Owner Communities. These details may include, but are not limited to, study results, rebate amounts, and products purchased related to participation. Purposes for which your customer data may be shared or used include, but are not limited to, determining your eligibility for the Program, program administration, marketing, quality control, providing you with products or services you request, offering you products or services that may be of interest to you, or analyzing your utility usage. Platte River and the Owner Communities may not have control over your customer data and cannot guarantee that it will remain confidential. You acknowledge that you are the owner of the property receiving Program services, or are otherwise eligible to receive program services, and that you are authorized to consent to the disclosure of the data as specified in this form.

1. To qualify for the Program the proposed facility must:
  - a. Facility is an existing commercial building served by one of the four following electric utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications, or Loveland Water and Power.
2. Obtain project pre-approval from Platte River prior to the study being performed.
3. Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.
4. Unless otherwise approved by Platte River, participant shall work with an approved SP to perform the qualified study.
5. Projects will be pre-approved or qualified on a case by case basis and are at the discretion of Platte River.
6. Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.
7. If the Participant chooses to not continue the project after preapproval, the Participant will not be eligible to receive a rebate from Platte River. The Participant will reimburse the SP for the services provided pro rata to the project termination date, or as otherwise set forth in the Participant's contract with the SP. Failure to provide information necessary for the SP to complete the study to the SP within 3 months of preapproval will be considered as the participant choosing not to continue the project.
8. Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.
9. For the purposes of Platte River's distributed energy solutions programs, a Participant is defined as a company or organization that receives electric service from one of Platte River's Owner Communities under an

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- approved municipal rate schedule. A Participant is a holder of a single account, multiple accounts in aggregate or corporate accounts. Multiple accounts or corporate accounts with a single municipal customer identification number will be considered a single Participant. An organization of this type can participate in multiple programs but will be subject to any applicable customer rebate caps. Platte River retains the right to make final determination of Participant eligibility.
9. Platte River may submit to Participant the name(s) and address(es) of the SP that Platte River identifies through a selection process to provide the technical support services if the project application is approved. The final decision to proceed under the Program and use of such persons will be subject to the approval of the Participant.
  10. Participant shall enter into a contractual legal agreement with the selected SP for fleet electrification study services described in the Program guide and other services to be performed at the request of the Participant.
  11. Participant agrees to require its employees, design team, and contractors to cooperate with Platte River and the SP to provide fleet operating data and energy use evaluation assistance needed by Platte River for participation in the Program, including cooperation in gathering electricity bills and releasing information to necessary parties in the Program.
  12. Platte River reserves the right to inspect the facility for compliance with the Program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the study is found to be in compliance with the Program requirements, the rebate will be paid otherwise the Participant will be notified.
  13. Platte River and SPs shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to hazardous materials of any kind in connection with the facility including, but not limited to, asbestos, asbestos products, PCBs, or other toxic substances. Participant is required to notify Platte River, SP, and other sub-contractors if hazardous materials exist prior to work being performed.
  14. Program procedures, requirements, and rebate levels are subject to change or cancellation without notice.
  15. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.
  16. Participation as a SP does not constitute an endorsement by Platte River, nor does it certify or guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the Program.
  17. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and may be supplemented only by the execution of the completion terms and conditions (Addendum #1), and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this program or its terms and conditions at any time.
  18. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising directly or indirectly, in whole or in part, out of participation in the Program, the performance of the study, or the provision of assistance and incentives by Platte River related to the Program.
  19. Rebate funds will be reserved for no more than 45 days beyond the estimated completion date listed in this agreement. Participant shall notify Platte River immediately if completion of the project is expected to be delayed beyond this time. Platte River will seek to provide funds for projects that are delayed, provided such funds are available, but is under no obligation to do so.
  20. Participant shall require that all parties, contractors, or subcontractors implementing the proposals and/or completing the study that are the subject of this agreement maintain comprehensive general liability insurance in amounts not less than \$500,000 each person \$1,000,000 each occurrence for bodily injury, and \$500,000 each occurrence \$1,000,000 in aggregate for property damage. If the Participant is implementing the proposals and/or installing the measures, the Participant shall maintain insurance in the amounts specified herein.
  21. The Participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for study.
  22. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency, electrification, or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.
  23. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.



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24. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.
25. These Terms and Conditions, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.
26. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially)

taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

By signing below, Participant acknowledge and agree that they have read, understand and agree to be bound by the terms and conditions set forth in this agreement, and to the customer eligibility, study eligibility and participation procedures for the Program in the Program guide as amended from time to time. The Participant further certify that all of the information contained within this application is true and factual.

#### Participant

Signature:  Date:

Name:  Address:

Title:  City, state, zip:

Company:  Phone:

#### Required – Authorization to alternate recipient

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:  Date:

Name:  Company:

Title:

#### Required – Alternate incentive payment recipient (typically registered service provider)

An IRS Form W-9 for the company named below must be submitted before payment can be made.

Company:



### A3. Fleet Electrification Study Incentive Agreement

The agreement shown on the next 3 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).

#### Fleet electrification study incentive agreement form

<b>Fleet electrification study service provider:</b>	
<b>Cost of study*:</b>	
<b>Tier:</b>	
<b>Completion date:</b>	

**Instructions:** This agreement must be read and signed by the Participant after the qualified fleet electrification service provider (SP) is selected and prior to work being performed. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.

Vehicle classification	Tier 1	Tier 2	Tier 3	*The study cost can be covered by Efficiency Works up to \$15,000 for Tier 1, up to \$20,000 for Tier 2 or up to \$30,000 for Tier 3. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.
Light-duty vehicles (LDVs) or non-road equipment	Up to 25 LDVs <b>OR</b>	26-100 LDVs <b>OR</b>	101+ LDVs <b>OR</b>	
Medium-and-heavy duty vehicles (MHDV)	Up to 5 MHDVs	6-12 MHDVs	13+ MHDVs	
Rebate per study	\$15,000	\$20,000	\$30,000	

#### Terms and conditions

- Participant acknowledges that the Efficiency Works program ("Program") is a partnership between Platte River Power Authority ("Platte River") and its owner communities of the Town of Estes Park, the City of Fort Collins, the City of Longmont and the City of Loveland (the "Owner Communities"). Platte River manages the Program. By participating in the Program, you acknowledge and agree that your customer data may be shared among the Owner Communities and third-party Program implementors for a variety of purposes. Participant data may include, but is not limited to, name, address, contact information, account number, utility usage data as well as details regarding your participation in the Program or other programs and services offered by Platte River or the Owner Communities. These details may include, but are not limited to, study results, rebate amounts, and products purchased related to participation. Purposes for which your customer data may be shared or used include, but are not limited to, determining your eligibility for the Program, program administration, marketing, quality control, providing you with products or services you request, offering you products or services that may be of interest to you, or analyzing your utility usage. Platte River and the Owner Communities may not have control over your customer data and cannot guarantee that it will remain confidential. You acknowledge that you are the owner of the property receiving Program services, or are otherwise eligible to receive program services, and that you are authorized to consent to the disclosure of the data as specified in this form.
- To qualify for the Program the proposed facility must:
    - Facility is an existing commercial building served by one of the four following electric utilities: Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications, or Loveland Water and Power.
  - Abide by the Program rules and eligibility requirements in effect on the date of the submitted project application.
  - Obtain project pre-approval from Platte River prior to the study being performed.
  - Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.
  - Unless otherwise approved by Platte River, participant shall work with an approved SP to perform the qualified study.
  - Projects will be pre-approved or qualified on a case by case basis and are at the discretion of Platte River.
  - Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.
  - If the Participant chooses to not continue the project after preapproval, the Participant will not be eligible to receive a rebate from Platte River. The Participant will reimburse the SP for the services provided pro rata to the project termination date, or as otherwise set forth in the Participant's contract with the SP. Failure to provide information necessary for the SP to complete the study to the SP within 3 months of preapproval will be considered as the participant choosing not to continue the project.
  - Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.
  - For the purposes of Platte River's distributed energy solutions programs, a Participant is defined as a company or organization that receives electric service from one of Platte River's Owner Communities under an

- approved municipal rate schedule. A Participant is a holder of a single account, multiple accounts in aggregate or corporate accounts. Multiple accounts or corporate accounts with a single municipal customer identification number will be considered a single Participant. An organization of this type can participate in multiple programs but will be subject to any applicable customer rebate caps. Platte River retains the right to make final determination of Participant eligibility.
9. Platte River may submit to Participant the name(s) and address(es) of the SP that Platte River identifies through a selection process to provide the technical support services if the project application is approved. The final decision to proceed under the Program and use of such persons will be subject to the approval of the Participant.
  10. Participant shall enter into a contractual legal agreement with the selected SP for fleet electrification study services described in the Program guide and other services to be performed at the request of the Participant.
  11. Participant agrees to require its employees, design team, and contractors to cooperate with Platte River and the SP to provide fleet operating data and energy use evaluation assistance needed by Platte River for participation in the Program, including cooperation in gathering electricity bills and releasing information to necessary parties in the Program.
  12. Platte River reserves the right to inspect the facility for compliance with the Program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the study is found to be in compliance with the Program requirements, the rebate will be paid otherwise the Participant will be notified.
  13. Platte River and SPs shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to hazardous materials of any kind in connection with the facility including, but not limited to, asbestos, asbestos products, PCBs, or other toxic substances. Participant is required to notify Platte River, SP, and other sub-contractors if hazardous materials exist prior to work being performed.
  14. Program procedures, requirements, and rebate levels are subject to change or cancellation without notice.
  15. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.
  16. Participation as a SP does not constitute an endorsement by Platte River, nor does it certify or guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the Program.
  17. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and may be supplemented only by the execution of the completion terms and conditions (Addendum #1), and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this program or its terms and conditions at any time.
  18. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising directly or indirectly, in whole or in part, out of participation in the Program, the performance of the study, or the provision of assistance and incentives by Platte River related to the Program.
  19. Rebate funds will be reserved for no more than 45 days beyond the estimated completion date listed in this agreement. Participant shall notify Platte River immediately if completion of the project is expected to be delayed beyond this time. Platte River will seek to provide funds for projects that are delayed, provided such funds are available, but is under no obligation to do so.
  20. Participant shall require that all parties, contractors, or subcontractors implementing the proposals and/or completing the study that are the subject of this agreement maintain comprehensive general liability insurance in amounts not less than \$500,000 each person \$1,000,000 each occurrence for bodily injury, and \$500,000 each occurrence \$1,000,000 in aggregate for property damage. If the Participant is implementing the proposals and/or installing the measures, the Participant shall maintain insurance in the amounts specified herein.
  21. The Participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for study.
  22. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency, electrification, or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.
  23. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.

24. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.
25. These Terms and Conditions, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.
26. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially)

taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

By signing below, Participant acknowledge and agree that they have read, understand and agree to be bound by the terms and conditions set forth in this agreement, and to the customer eligibility, study eligibility and participation procedures for the Program in the Program guide as amended from time to time. The Participant further certify that all of the information contained within this application is true and factual.

#### Participant

Signature:

Name:

Title:

Company:

Date:

Address:

City, state, zip:

Phone:

#### Required – Authorization to alternate recipient

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:

Name:

Title:

Date:

Company:

#### Required – Alternate incentive payment recipient (typically registered service provider)

An IRS Form W-9 for the company named below must be submitted before payment can be made.


Company:



## Appendix B – Study Incentive Completion Terms & Conditions

### B1. Building and Process Electrification Study Incentive Completion Terms & Conditions

The agreement shown on the next 2 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).

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<b>Building &amp; Process Electrification (BPE) study incentive completion terms &amp; conditions</b>											
<b>Instructions:</b> This agreement must be read and signed by the Participant after the qualified BPE service provider (SP) has completed the study and has presented the report to the Participant. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.											
<table border="1"><tr><td>BPE Compliance study service provider:</td><td></td></tr><tr><td>Cost of study*:</td><td></td></tr><tr><td>Tier:</td><td></td></tr><tr><td>Completion date:</td><td></td></tr></table>			BPE Compliance study service provider:		Cost of study*:		Tier:		Completion date:		
BPE Compliance study service provider:											
Cost of study*:											
Tier:											
Completion date:											
<table border="1"><thead><tr><th>Tier</th><th>Description</th><th>Incentive</th></tr></thead><tbody><tr><td>Tier 1</td><td>Building only</td><td>\$15,000</td></tr><tr><td>Tier 2</td><td>Building and process</td><td>\$25,000</td></tr></tbody></table>			Tier	Description	Incentive	Tier 1	Building only	\$15,000	Tier 2	Building and process	\$25,000
Tier	Description	Incentive									
Tier 1	Building only	\$15,000									
Tier 2	Building and process	\$25,000									
<p>*The study cost can be covered by Efficiency Works up to \$15,000 for Tier 1 studies and \$25,000 for Tier 2 studies. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.</p>											
<b>By signing this addendum to the Efficiency Works building &amp; process electrification study incentive agreement, the Participant represents, warrant, acknowledge and agree that:</b>											
<ol style="list-style-type: none"><li>1. I have read, understand, and agree to all terms and conditions of the project application and the Participant eligibility, measure eligibility, and participation procedures for the study incentive program outlined above in the Efficiency Works program guide.</li><li>2. I understand that these requirements may be amended from time to time and agree to be bound by any such amendments.</li><li>3. I certify that all the information contained within this application is true and factual.</li><li>4. I agree that the SP completed the study to the Program requirements and has presented the findings to the appropriate representatives of the Participant.</li><li>5. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless, Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising, directly or indirectly, in whole or in part, out of participation in the Program, the performance of the recommended study, or the provision of assistance and incentives by Platte River related to the Program.</li><li>6. Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.</li><li>7. Unless otherwise approved by Platte River, Participant shall work with an approved SP to perform the qualified study. Participant shall adhere to the steps and requirements of the Program.</li><li>8. Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the Participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.</li><li>9. Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.</li><li>10. Platte River reserves the right to inspect the facility for compliance with the program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the equipment is found to be in compliance with the program requirements, the rebate will be paid otherwise the Participant will be notified.</li><li>11. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.</li><li>12. Participation as an SP does not constitute an endorsement by Platte River, nor does it certify or</li></ol>											
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- guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the program.
13. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this Program or its terms and conditions at any time.
  14. The participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for qualified studies.
  15. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.
  16. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.
  17. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.
  18. These Terms and Conditions, the study incentive agreement, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.
  19. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially) taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

**Participant**

Signature:


Name:

Title:

Company:

Date:

Address:

City, state, zip:

Phone:

**Required – Authorization to alternate recipient**

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:

Name:

Title:

Date:

Company:

**Required – Alternate incentive payment recipient (typically registered service provider)**


An IRS Form W-9 for the company named below must be submitted before payment can be made.

Company:



## B2. Building Performance Standards Compliance Study Incentive Completion Terms & Conditions

The agreement shown on the next 2 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).



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### Building Performance Standards (BPS) Compliance study incentive completion terms & conditions

**Instructions:** This agreement must be read and signed by the Participant after the qualified BPS compliance service provider (SP) has completed the study and has presented the report to the Participant. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.

<b>BPS Compliance study service provider:</b>	
<b>Cost of study*:</b>	
<b>Bonuses:</b>	
<b>Completion date:</b>	

Vehicle classification	Eligibility	Incentive
Building Performance Standards Compliance Study Incentive	Buildings greater than or equal to 50,000 sq. ft. subject to the State of Colorado BPS, with commercial electric service from a qualifying electric utility listed in term 1A.	\$15,000
Building Performance Standards Bonus	All requirements of the BPS study incentive, plus eligibility requirements outlined in the BPS bonus application. Not available to Estes Park Power & Communications customers.	\$5,000
Electrification study focus bonus	All requirements of the BPS study incentive, plus electrification study	\$5,000

\*The study cost can be covered by Efficiency Works up to \$15,000 for standard BPS compliance study, \$20,000 for studies eligible for the BPS bonus or the electrification study focus bonus, or \$25,000 for studies eligible for both bonuses. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.

**By signing this addendum to the Efficiency Works BPS compliance study incentive agreement, the Participant represent, warrant, acknowledge and agree that:**

1. I have read, understand, and agree to all terms and conditions of the project application and the Participant's eligibility, measure eligibility, and participation procedures for the study incentive program outlined above in the Efficiency Works program guide.
2. I understand that these requirements may be amended from time to time and agree to be bound by any such amendments.
3. I certify that all the information contained within this application is true and factual.
4. I agree that the SP completed the study to the Program requirements and has presented the findings to the appropriate representatives of the Participant.
5. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless, Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising, directly or indirectly, in whole or in part, out of participation in the Program, the performance of the recommended study, or the provision of assistance and incentives by Platte River related to the Program.
6. Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.
7. Unless otherwise approved by Platte River, Participant shall work with an approved SP to perform the qualified study. Participant shall adhere to the steps and requirements of the Program.
8. Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the Participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.
9. Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.
10. Platte River reserves the right to inspect the facility for compliance with the program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the equipment is found to be in compliance with the program requirements, the rebate will be paid otherwise the Participant will be notified.
11. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.
12. Participation as an SP does not constitute an endorsement by Platte River, nor does it certify or

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Effective January 1, 2025 until further notice
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- guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the program.
13. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this Program or its terms and conditions at any time.
14. The participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for qualified studies.
15. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.
16. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.
17. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.
18. These Terms and Conditions, the study incentive agreement, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.
19. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially) taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

#### Participant

Signature:

Date:

Name:

Address:

Title:

City, state, zip:

Company:

Phone:

#### Required – Authorization to alternate recipient

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:

Date:

Name:

Company:

Title:

#### Required – Alternate incentive payment recipient (typically registered service provider)

An IRS Form W-9 for the company named below must be submitted before payment can be made.

Company:



### B3. Fleet Electrification Study Incentive Completion Terms & Conditions

The agreement shown on the next 2 pages is for reference only. This agreement shall be completed and signed by the participant prior to incentive preapproval and work begins. Incentives may be paid to an authorized alternate recipient identified by the participant. Acceptable signatures include physical signatures (print, sign, then scan or photograph), or verified e-signatures (DocuSign, Adobe Sign, etc.).

#### Fleet electrification study incentive completion terms & conditions

<b>Fleet electrification study service provider:</b>	
<b>Cost of study*:</b>	
<b>Tier:</b>	
<b>Completion date:</b>	

**Instructions:** This agreement must be read and signed by the Participant after the qualified fleet electrification service provider (SP) has completed the study and has presented the report to the Participant. The SP will submit the agreement form with the Program application. Contact Efficiency Works for questions you may have regarding this agreement.

Vehicle classification	Tier 1	Tier 2	Tier 3
Light-duty vehicles (LDVs) or non-road equipment	Up to 25 LDVs <b>OR</b>	26-100 LDVs <b>OR</b>	101+ LDVs <b>OR</b>
Medium-and-heavy duty vehicles (MHDV)	Up to 5 MHDVs	6-12 MHDVs	13+ MHDVs
Rebate per study	\$15,000	\$20,000	\$30,000

\*The study cost can be covered by Efficiency Works up to \$15,000 for Tier 1, up to \$20,000 for Tier 2 or up to \$30,000 for Tier 3. Study costs will not be fully funded until the study report is completed and has been presented to the Participant.

**By signing this addendum to the Efficiency Works fleet electrification study program agreement, the Participant represent, warrant, acknowledge and agree that:**

1. I have read, understand, and agree to all terms and conditions of the project application and the Participant eligibility, measure eligibility, and participation procedures for the study incentive program outlined above in the Efficiency Works program guide.
2. I understand that these requirements may be amended from time to time and agree to be bound by any such amendments.
3. I certify that all the information contained within this application is true and factual.
4. I agree that the SP completed the study to the Program requirements and has presented the findings to the appropriate representatives of the Participant.
5. In consideration of receiving the incentives stated herein, Participant shall indemnify, protect, defend and hold harmless, Platte River, its board members, directors, officers, employees, partners, principals, contractors, agents, and representatives, from and against any and all claims, costs, damages, demands, expenses, fines, judgments, liabilities, losses, penalties, and remedial actions of any kind, including but not limited to, reasonable attorneys' fees and the costs of defense arising, directly or indirectly, in whole or in part, out of participation in the Program, the performance of the recommended study, or the provision of assistance and incentives by Platte River related to the Program.
6. Failure to provide any of the required information, including signatures, forms, or other requested documentation, will result in the return of the project application.
7. Unless otherwise approved by Platte River, Participant shall work with an approved SP to perform the qualified study. Participant shall adhere to the steps and requirements of the Program.
8. Platte River rebate for the partial cost of the study services described in the Program guide will be paid directly to the Participant, unless an approved alternative payment recipient is identified. The SP can be designated as an alternate payment recipient.
9. Participant rebates may be subject to a cumulative rebate cap per calendar year. Reaching this cap will not necessarily limit future rebates received from Platte River in a subsequent calendar year.
10. Platte River reserves the right to inspect the facility for compliance with the program requirements. Inspection may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to two years after installation. Participants will allow Platte River and their subcontractors' reasonable access to and egress from site during normal business hours for inspection purposes. If selected for inspection, the rebate will be withheld pending outcome of the inspection. If the equipment is found to be in compliance with the program requirements, the rebate will be paid otherwise the Participant will be notified.
11. Platte River makes no representations and provides no warranty or guarantee with respect to the accuracy or completeness of the provided technical support services.
12. Participation as an SP does not constitute an endorsement by Platte River, nor does it certify or

guarantee the quality of work performed. Platte River is not responsible if the SP or other contractor, retailer, vendor or other party provides the Participant with inaccurate information about the amount of any rebate or conditions of the program.

13. The terms and conditions set forth herein constitute the complete agreement applicable to this Program and supersede all prior representations or understandings, whether written or oral. Platte River shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. Platte River reserves the right to change or cancel this Program or its terms and conditions at any time.
14. The participant understands that Platte River or its Owner Communities cannot pay more than 100% of the project cost for qualified studies.
15. Participant acknowledges that neither Platte River or its consultants are responsible for the calculation, collection, or distribution of any tax credits, tax deductions, or third-party rebates that you may be eligible to receive for energy efficiency or renewable energy measures, and that neither SP nor Platte River can or have given any advice regarding Federal or state tax consequences.

16. Participant agrees to receive future correspondence via information listed in this application regarding Program offerings.

17. Platte River and/or its representatives may include a description of this project, including the nature and extent of Participant's participation and other project details in its case studies, brochures, press release, its web site advertisements and other marketing materials presented to the public.

18. These Terms and Conditions, the study incentive agreement, any Program manuals and any other application forms submitted by the Participant constitute the entire agreement between the parties concerning the subject matter hereof. No prior representation, promises, statement, warranties, understandings, or agreements concerning the subject matter hereof shall modify or effect these Terms and Conditions.

19. Payments provided by utilities (including Platte River) to Participants for the purchase or completion of the study may in some circumstances be considered as (partially) taxable income by the IRS. Participants or their assigns receiving incentive payments totaling \$600 or more during a program year and who are not organized as a corporation will receive a 1099-MISC from Platte River in January or February of the subsequent year. Participant, or alternate payment recipient, may wish to consult a tax advisor on this matter.

#### Participant

Signature:

Date:

Name:

Address:

Title:

City, state, zip:

Company:

Phone:

#### Required – Authorization to alternate recipient

I authorize Efficiency Works to make the incentive payment to the identified party below. This section to be completed by the Participant.

Signature:

Date:

Name:

Company:


Title:

#### Required – Alternate incentive payment recipient (typically registered service provider)

An IRS Form W-9 for the company named below must be submitted before payment can be made.

Company:

## Appendix C – Building Performance Standards Bonus Application



**Efficiency Works™**

**Building Performance Standards Bonus application**

Approval date:   
 Approval code:   
(For administrative use only)

The Building Performance Standards Bonus is available to nonprofit businesses that provide critical community services and multifamily properties. The bonus provides an additional \$5,000 to cover up to 100% of a Building Performance Standards Study cost. To receive bonus funds, the study must be preapproved after January 1, 2025, and completed with all final paperwork submitted before November 15, 2025. Bonus funding is limited and subject to availability. Standard rebate caps and requirements apply. See the Program Guide for details.

**Instructions for use:**

1. Verify your organization meets the eligibility requirements listed below.
2. Complete the following grant application.
3. Submit this application for preapproval with the Building Performance Standards Compliance Study incentive application.

**Applicant information** (\*indicates a required field)

<input type="text"/> Contact name* <input type="text"/> Business name* <input type="text"/> Contact phone number* <input type="text"/> Site address* <input type="text"/> Serving electric utility* <input type="text"/>	<input type="text"/> Contact Title* <input type="text"/> Doing business as (if applicable) <input type="text"/> Contact email address* <input type="text"/> State* <input type="text"/> Zip* <input type="text"/> Serving water utility <input type="text"/>
--	---

**Eligibility requirements (check all that apply):**

Businesses that provide critical local community services (must select 2 or more):

<input type="checkbox"/> Your organization is an IRS 501(c)3 nonprofit in good standing with the State of Colorado. <input type="checkbox"/> Your organization is a community service provider defined as a nonprofit tax-exempt entity whose core mission is to provide one of the following critical community services (please select all that apply): <ul style="list-style-type: none"> <li><input type="checkbox"/> Childcare centers in dedicated community spaces</li> <li><input type="checkbox"/> Community centers</li> <li><input type="checkbox"/> Disability service providers</li> <li><input type="checkbox"/> Domestic violence centers</li> <li><input type="checkbox"/> Emergency services organizations</li> <li><input type="checkbox"/> Family support organizations</li> <li><input type="checkbox"/> Food pantries</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Homeless shelters</li> <li><input type="checkbox"/> Immigration service providers</li> <li><input type="checkbox"/> Job training and workforce development services</li> <li><input type="checkbox"/> Libraries not owned by a town or municipal government</li> <li><input type="checkbox"/> Mental and behavioral health facilities</li> <li><input type="checkbox"/> Rehabilitation providers</li> <li><input type="checkbox"/> Women's or children's shelters</li> </ul>
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☐ Your organization is a place of worship with low-income or community welfare services provided directly from the organization. Only the specific areas of the facilities that are used to provide these services are eligible. A summary of the services and what parts of the facilities they are provided in must be submitted along with this application.

☐ Other - if there are additional eligibility considerations, please tell us why your business/organization should be considered for this grant:

**Multifamily properties (must select 1)**

☐ Your multifamily property has 5 or more residential units per building and has a commercial electric meter on site.

☐ Your multifamily property has 5 or more residential units per building, has a commercial electric meter on site, and 66% of your resident population is at or below 80% of area median income.

☐ By checking this box, I confirm that I can verify the selected eligibility requirement(s) upon request and that I agree with the terms and conditions as listed on the Efficiency Works Business rebate application.\*

\_\_\_\_\_  
Signature\*

\_\_\_\_\_  
Date\*

Effective January 1, 2025 until further notice



## Appendix D – Abbreviations glossary

BPE – Building and Process Electrification

BPS – Building Performance Standards

EUI – Energy Use Intensity

EV – Electric Vehicle

EVSE – Electric Vehicle Supply Equipment

EW – Efficiency Works

EWB – Efficiency Works Business

FE – Fleet Electrification

GHG – Greenhouse Gas

GHGI – Greenhouse Gas Intensity

ICE – Internal Combustion Engine

kW – Kilowatt

kWh – Kilowatt Hour

LDV – Light Duty Vehicle

MHDV – Medium/Heavy Duty Vehicle

MTCO<sub>2</sub>e – Metric Tons of Carbon Dioxide Equivalents

SP – Service Provider (listed service provider)