



# **Efficiency Works Business**

## **Fleet electrification study program guide**

**Effective July 2024**

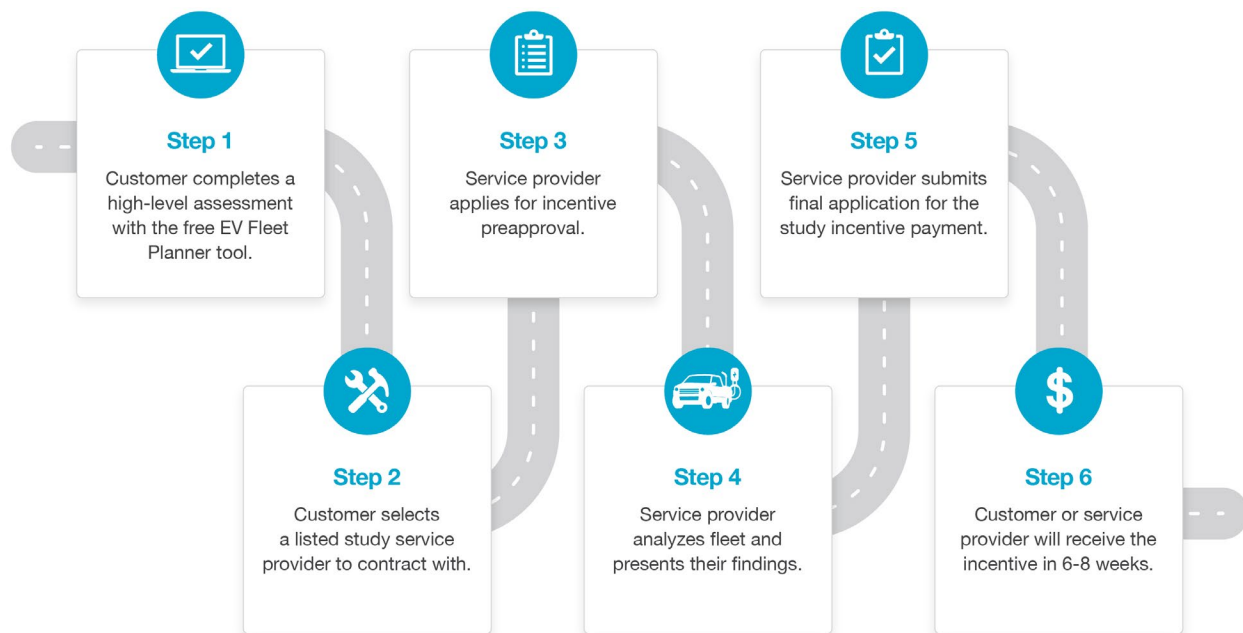
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## Efficiency Works Fleet Electrification Study Program overview

The Efficiency Works Business Fleet Electrification Study Program (FESP) 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 FESP 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 FESP process overview for customers and SPs.



## Program contacts

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

## 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.

**Reminder:** 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.

## Customer participation and eligibility criteria

Customers interested in receiving a fleet assessment will participate in the program 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 FESP 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 FESP. 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 outputs 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 to the FESP 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 Fleet Electrification Study 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 fleets 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.

## Listed service provider requirements and qualifications

The Fleet Electrification Study Program offering utilizes a curated group of Efficiency Works approved third-party vendors known as listed service providers (SPs) that conduct assessments for 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 the FESP.

### 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

### Additional requirements for FESP participation

Once enrolled as an Efficiency Works listed SP, SPs seeking to participate in the FESP must then also meet the additional requirements stipulated below in order to conduct a fleet assessment through the FESP. SPs can become FESP SPs 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.

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

### Program marketing and participant communication

SPs play a critical role in identifying viable fleet electrification project opportunities and facilitating the participant application process. However, since not all program applications will be accepted, 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 FESP 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 and fleet.

During the process of completing a project under the FESP program, SPs are encouraged to contact the designated participant contact as necessary to coordinate FESP 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.

## Fleet assessment services and incentives

Through the FESP, 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

## Program process and payment

The following steps represent the full process of participation in the FESP:

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.
    - 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 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:
    - 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 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.

## 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 Program (FESP)?**

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 install electric equipment at the place(s) of business identified on the incentive application.
3. 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 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 FESP. 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 FESP?**

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 FESP?**

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 FESP. 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>.

## Appendix A – 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

**Fleet electrification study service provider:**

**Cost of study\*:**

**Tier:**

**Completion date:**

**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
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.

#### 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:

- 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:

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 B – Fleet Electrification 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

Fleet electrification study service provider:	
Cost of study*:	
Tier:	
Completion date:	

**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 OR	26-100 LDVs OR	101+ LDVs OR
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 – Abbreviations glossary

EV – electric vehicle

EVSE – electric vehicle supply equipment

EW – Efficiency Works

EWB – Efficiency Works Business

FESP – Fleet Electrification Study Program

GHG – greenhouse gas

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)