



Estes Park | Fort Collins | Longmont | Loveland

Study incentives 101

2025 service provider training



Agenda

- Welcome
- Efficiency Works overview
- Study incentives introduction
- Building Performance Standards Compliance Study incentives
- Building and Process Electrification Study incentives
- Fleet Electrification Study incentives
- Other service provider support services
- Q&A

Safety minute and housekeeping items

Food and beverages

- Help yourself throughout
- Garbage cans are in the back

Restrooms

- Outside the rear doors

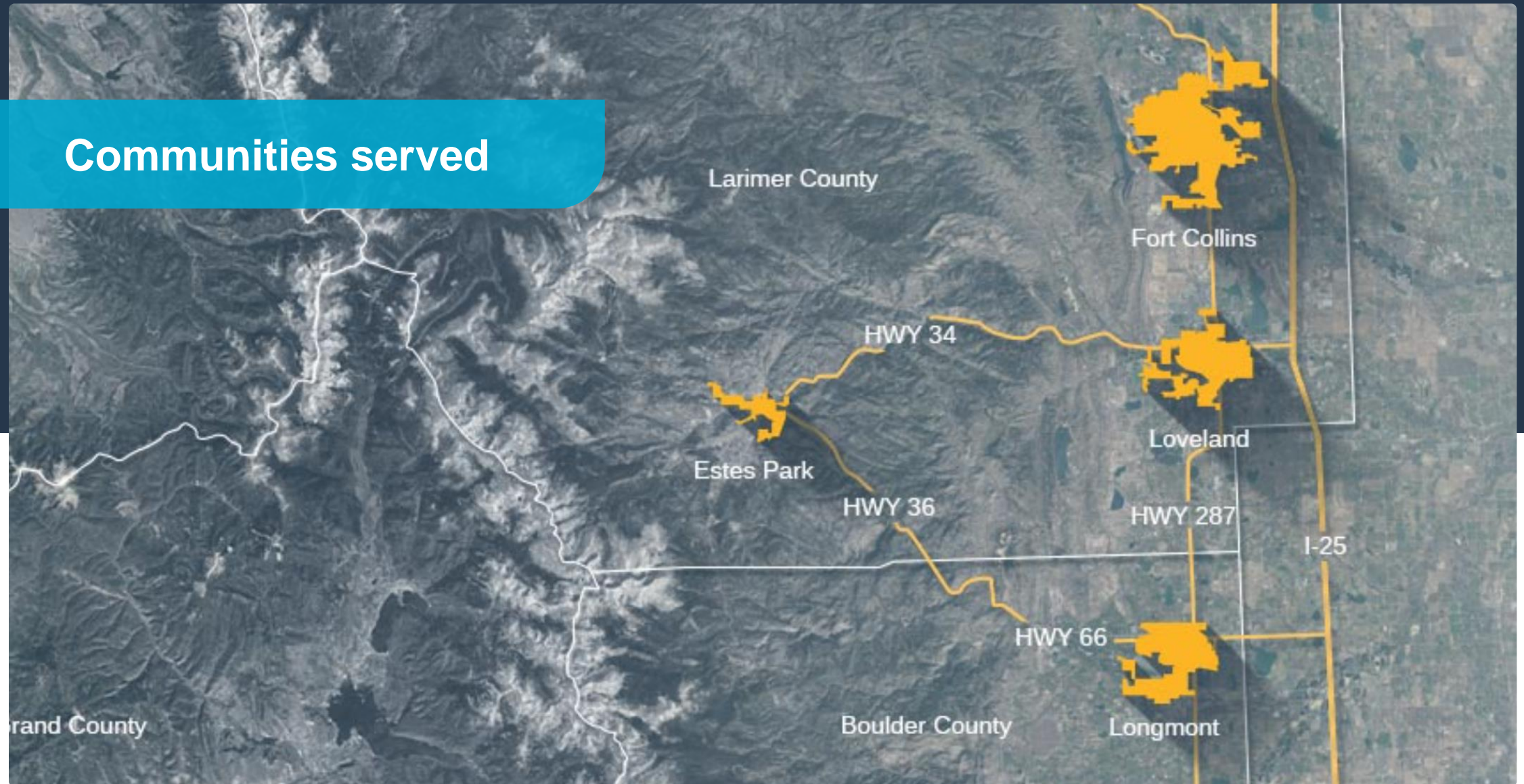
Guest check-in and public area

- All guests should have checked in at the security desk and received a visitor badge
- Visitors must stay in the public area unless escorted by a Platte River employee

Emergency protocols

- Emergency exits
- Meeting location/find a Platte River employee

Communities served





Using a trusted resource to connect with customers

Efficiency Works is a **regional utility collaboration** that provides guidance and resources to enable **customers** to **use energy effectively**, work toward a noncarbon energy future and build strong, resilient communities for customers served by Platte River Power Authority and its owner communities of Estes Park, Fort Collins, Longmont and Loveland.

Efficiency programs for all needs



Resources

Work with staff to access professional resources to support projects or get facility assessments completed.



Service providers

Be listed on the Efficiency Works “Find a service provider” page used by customers looking for efficiency upgrade professionals.



Incentives

Offset the cost of efficiency upgrades through rebates and direct install opportunities.



Building tune-ups

Optimize existing facilities' HVAC systems through enhanced maintenance and retrocommissioning efforts.

Ten years of impact

Business

Over 300 service providers participated

Over 19,000 LED lamps installed

Over \$50 million rebates paid



Over 190,000 MWh saved

Over 3,200 upgrades

Over \$17 million saved in electricity costs

2025 programming



Business rebates

Categories:

- LED lighting
- Building envelope
- Cooling retrofits
- Food service
- Grocery
- Office and appliance
- VFDs
- Public EV charging infrastructure
- Building operator certification
- Custom

Eligibility:

A commercial electric meter served by an eligible electric utility

A photograph of a modern commercial kitchen. In the center is a large stainless steel refrigerator. To its right is a tall stack of three ovens, each with a digital display and control panel. Below the ovens are two racks filled with round loaves of bread. To the left of the refrigerator is a stainless steel prep table with several metal containers and a small stack of vegetables. To the right of the ovens is a large industrial mixer. The background is a white tiled wall.

Upgrade to more efficient equipment

Get started today at EfficiencyWorks.org/business/rebates

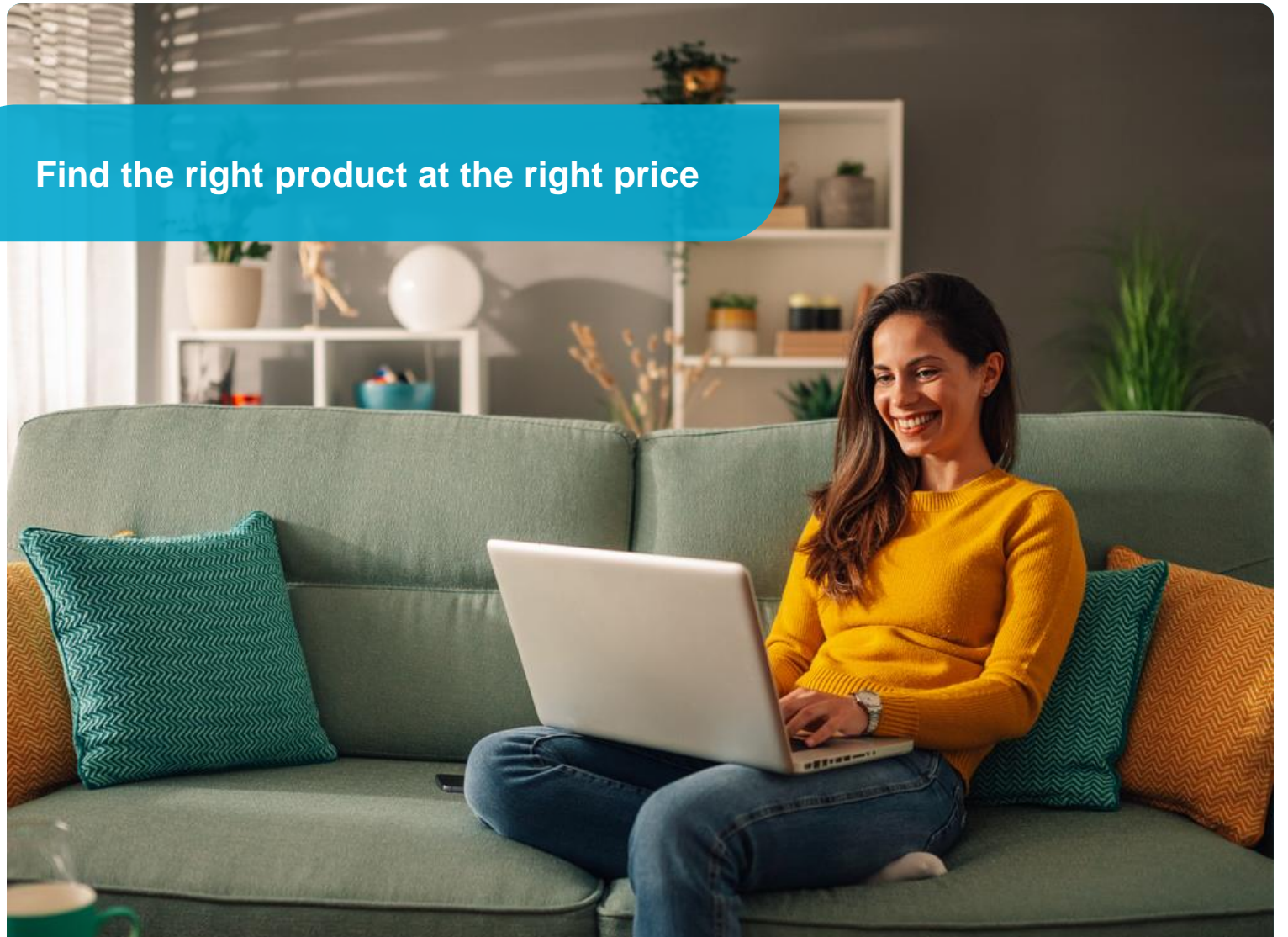
Efficiency Works Store

Compare thousands of products to find the most efficient choice for your needs.

- Browse products from residential-style appliances to lawn and garden equipment
- Instant rebates* on select equipment that can be combined with manufacturer promotions

*Electric meter served by an eligible utility is required

Find the right product at the right price



Start shopping today at **EWStore.org**

Appliance recycling

Free up the grid and your electricity costs by recycling that old fridge or freezer!

- Free pick-up of working (cooling) 10-30 cu ft refrigerators or freezers
- Can add on a mini fridge or room/window A/C unit with your larger appliance pick-up for free
- Businesses eligible to participate, bulk pickup options available

Eligibility:

Electric customers of Estes Park, Fort Collins and Longmont.

Convenient, responsible recycling



Learn more and schedule your pickup at **[EWRecycle.com](https://www.ewrecycle.com)**

Commercial energy advising and assessments

Free assistance for participants to identify opportunities, build plans for efficiency upgrades and guide them through the process.

Specific offerings tailored to your business needs:

- Small and medium business
- Large commercial and industrial

Eligibility:

A commercial electric meter served by an eligible electric utility



Connect with an energy advisory today!



Get started today at EfficiencyWorks.org/business/advising-and-assessments

Multifamily program

Assisting property managers with efficiency improvements through free facility assessments, energy advising and direct installs of efficiency equipment.

Eligibility:

- A commercial electric meter served by an eligible electric utility
- Five or more residential units per building

Sign up for an assessment today!



Get started today at EfficiencyWorks.org/business/multi-family

Building Tune-up

Incentives to optimize building control systems and improved maintenance practices.

Performance Plus

Partnering with local HVAC service providers to improve commercial HVAC performance through enhanced maintenance.

Retrocommissioning (RCx)

Expert building analysis of building automation systems, retrocommissioning services and energy optimization to help lower energy costs from HVAC systems.

Eligibility:

A commercial electric meter served by an eligible electric utility

Enhance HVAC performance by connecting with a service provider



Get started today at EfficiencyWorks.org/business/building-tune-up

2025 study incentives



Study incentives

Study incentives overview

- Incentives are intended to offset some or all of the study's cost based on the scope of work entered on the incentive preapproval application
- Preapproval is always required before any study efforts begin
- An in-depth study is not always necessary for a customer and may not always be preapproved

Service provider role

- The study incentive offerings utilize approved third-party vendors known as listed service providers to conduct studies for eligible customers
- Non-listed vendors are ineligible to participate
- Our goal is to provide high-quality customizable information for customers exploring the transition to electric vehicles, buildings or processes or subject to state building performance requirements, focusing on financial and environmental impacts which will help customers make informed and actionable decisions

General service provider listing process

(applicable to all EWB programs)

Initial requirements

- Complete an online application at efficiencyworks.org/service-providers
 - Upload a certificate of liability insurance listing Platte River Power Authority as the Certificate Holder and Additional Insured
 - Upload a signed and dated W-9
 - Sign the Efficiency Works service provider terms and conditions
- Attend two Efficiency Works Business trainings to ensure understanding of program rules and requirements

Requirements to remain listed

- Complete a minimum of one project per calendar year
- Consistently pass inspections
- Uphold the ethics requirements in the service provider agreement
- Renew the service provider application every two years
- Maintain general liability insurance policy according to program requirements

Grounds for delisting

- Providers 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 Efficiency Works program to utility customers
 - Failure to maintain required documentation to be a listed Efficiency Works service provider

Study incentive service providers

Additional requirements for study specialties

- 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 building, process and/or fleet electrification
- 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

Study incentives program guide

This training only provides an introduction to program expectations and requirements. Please reference the latest program guide online for more details.

efficiencyworks.org/wp-content/uploads/Efficiency-Works-Business-Study-Incentives-Program-Guide.pdf



Efficiency Works Business Study Incentives Program Guide

Effective January 2025

Building Performance Standards (BPS) Compliance Study incentives



BPS Compliance Study incentives

Process overview (customer process)



Step 1

Determine whether your building is subject to the State of Colorado BPS. Identify the need for an in-depth study to discover paths to compliance.



Step 2

Contract with a listed service provider to submit a preapproval application and complete the study.



Step 3

Your study results are delivered, final application is submitted and the rebate is processed for payment.

Building Performance Standards Compliance Study

customer eligibility

Customer criteria

- The customer building is subject to the State of Colorado's BPS
- Is a commercial electric customer of one of the following municipal utilities:
 - Estes Park Power and Communications
 - Fort Collins Utilities
 - Longmont Power & Communications
 - Loveland Water and Power
- The building is existing and complete, not under construction or planned to be constructed
- Participants have the legal right and authority to install electric equipment at the place(s) of business identified on the incentive application
- Participant agrees to share the final study report with Efficiency Works

BPS Compliance Study incentives

- Base incentive plus two potential bonuses.
- Incentive may cover up to 100% of project cost.

Offering	Eligibility	Incentive
Building Performance Standards compliance study incentive	Buildings \geq 50,000 sq ft and subject to the State of Colorado's BPS, with commercial electric service from one of the four 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

- The **Building Performance Standards Bonus** is available to nonprofit businesses that provide critical community services and multifamily properties. To receive bonus funds, the study must be preapproved after Jan. 1, 2025, and completed with all final paperwork submitted before Nov. 15, 2025.
- 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.

Note - 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. Check for recent program changes and get up to date incentive information at efficiencywork.org or business@efficiencyworks.org

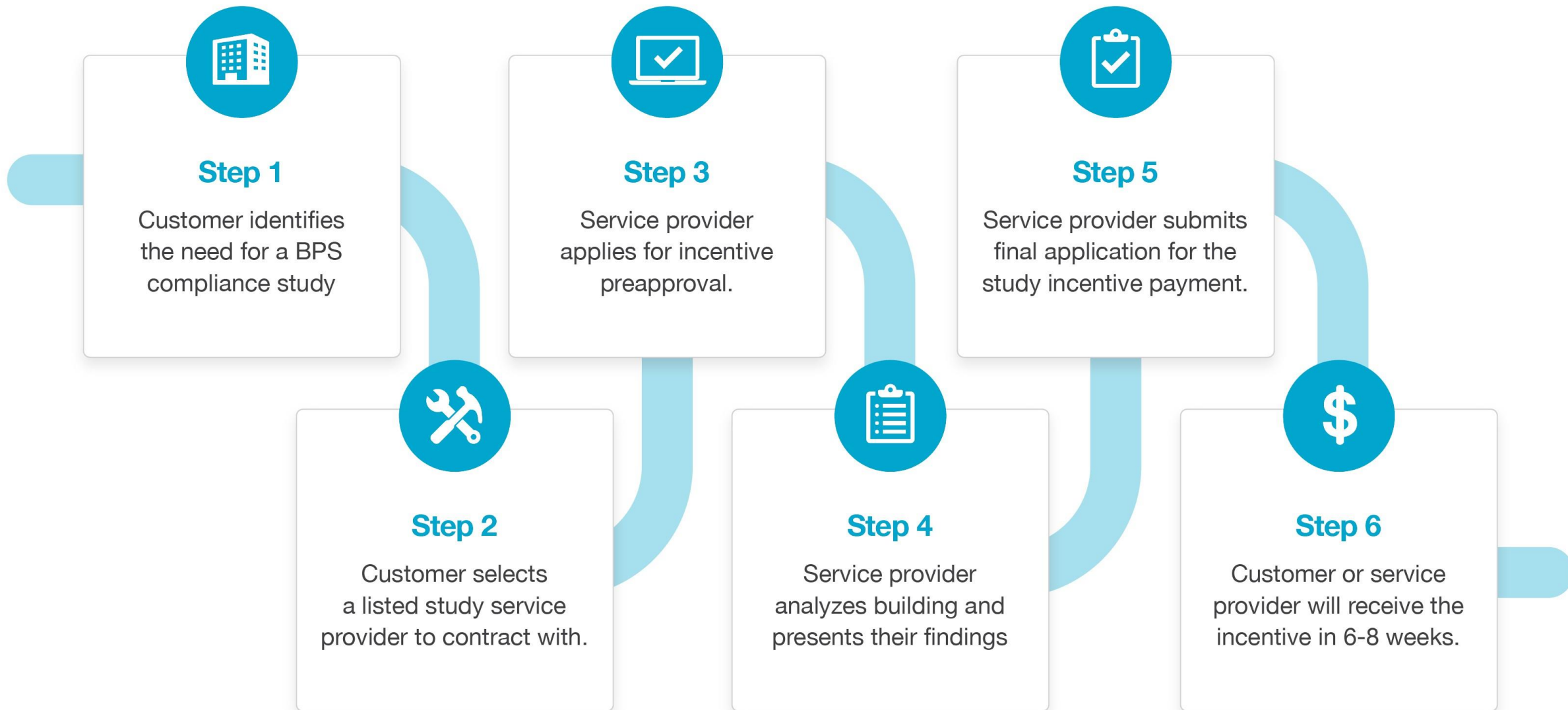
BPS Compliance Study report

Copy of report due with final incentive application package.

EW staff will review report to ensure that values match key application inputs.

Minimum requirements:

- List of recommendations and recommended compliance path
- Whether an adjustment request is needed
- Potential energy savings and 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 and equipment costs
- Estimated total costs
- Whether it is anticipated that electric service upgrade is needed
- State and Federal funding opportunities (list provided from EWB to insert into report or provide as supporting documentation)



Customer journey for BPS Compliance Study specialty

Customer journey requirements

Provide a positive customer journey that accomplishes the steps outlined below. The customer journey might differ slightly between providers but will include the below steps at a minimum:

- Conduct intake call and provide customer with study proposal
- Receive accurate data from customer (documentation of this customer transaction required)
- Conduct analysis
- Conduct final presentation to the customer and allow time for adequate feedback or questions (documentation of this customer transaction required)
- Deliver final report

Building and Process Electrification (BPE) Study incentives



Building and Process Electrification Study incentives

Process overview (customer process)



Building and Process Electrification Study customer eligibility

Customer criteria

- The building location is a commercial electric customer of one of the following municipal utilities:
 - Estes Park Power and Communications
 - Fort Collins Utilities
 - Longmont Power & Communications
 - Loveland Water and Power
- The building owner or owner's representative anticipates the need to replace equipment within the next three years
- An energy audit has been completed for the building within the last three years
- Have the legal right and authority to make building changes at the place(s) of business
- 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
- The owner agrees to share the final report with the program

Building and Process Electrification Study incentives

- Incentive tiers based on scope of work
- Incentives up to 100% of project cost

*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. Check for recent program changes and get up to date incentive information at efficiencywork.org or business@efficiencyworks.org

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

Note 1: The building must be a commercial electric customer of Estes Park Power and Communications, Fort Collins Utilities, Longmont Power & Communications or Loveland Water and Power.

Note 2: 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.

Customer journey for BPE Study specialties

Customer journey requirements

Provide a positive customer journey that accomplishes the steps outlined below. The customer journey might differ slightly between providers but will include the below steps at a minimum:

- Conduct intake call and provide customer with study proposal
- Receive accurate data from customer (documentation of this customer transaction required)
- Conduct analysis
- Conduct final presentation to the customer and allow time for adequate feedback or questions (documentation of this customer transaction required)
- Deliver final report

Building and Process Electrification Study report

Due at incentive payment phase.

EW staff will review report to ensure that values match key application inputs.

Minimum requirements:

- Estimated upgrade costs and simple payback calculations
- Estimated Energy Use Intensity (EUI) impact for each measure
- Estimated emissions impact (e.g., MTCO₂e or GHGI) for each measure
- Replacement/electrification recommendations and an estimate of remaining useful life for gas-fired space heating and water heating equipment, including equipment sizing
- 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, on-site solar, etc.)
- At the building owner's request, provide an estimate of remaining useful life and replacement options for gas-fired commercial kitchen equipment
- State and Federal funding opportunities (list provided from EWB to insert into report or provide as supporting documentation)



Step 1

Customer contacts service provider for a quote, wins bid, and goes under contract with the customer.



Step 3

Service provider completes electrification study.



Step 5

Service provider requests incentive payment for study deliverable.



Step 2

Service provider applies for electrification preapproval.



Step 4

Service provider provides customer with analysis and presentation containing the required deliverables and resources.



Step 6

Service provider may continue working with customer to implement electrification outside of Efficiency Works Business.



Fleet Electrification Study incentives

Fleet Electrification Study incentives

Incentives overview

- Incentives are intended to offset some or all of the study's cost based on vehicle duty type and quantities entered on the incentive preapproval application
- Preapproval is always required before customer fleet analysis begins
- An in-depth fleet electrification study is not always necessary for a customer and may not always be preapproved. Customers may be able to utilize Efficiency Works' free EV Fleet Planner tool

Service provider role

- The Fleet Electrification Study incentive offering utilizes approved third-party vendors known as listed service providers to conduct fleet electrification studies for eligible customers
- Non-listed vendors are ineligible to participate
- Our goal is to provide high-quality customizable information for customers exploring the transition to electric vehicles focusing on financial and environmental impacts which will help customers make informed and actionable decisions about the future of their fleets

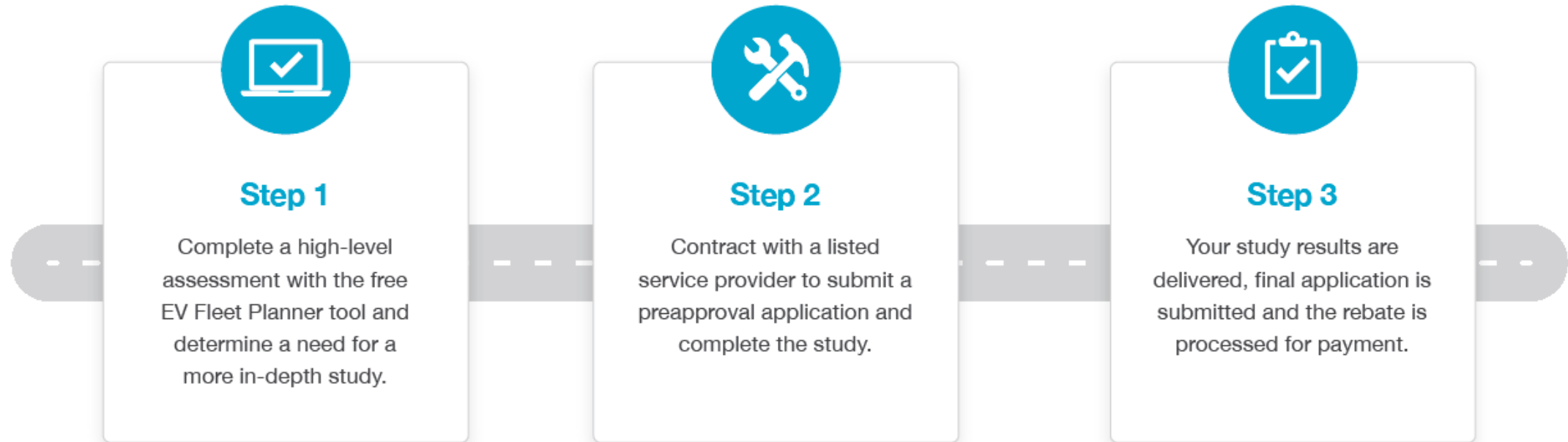
Fleet Electrification Study incentives

Customer eligibility

- The dwell location of the fleet vehicles is a commercial electric customer of one of the following municipal utilities:
 - Estes Park Power and Communications
 - Fort Collins Utilities
 - Longmont Power & Communications
 - Loveland Water and Power
- Equipment that dwells at other facilities outside the service area do not qualify for incentive eligibility but may be included in the assessment report
- Participants have the legal right and authority to install electric equipment at the place(s) of business identified on the incentive application

Fleet Electrification Study incentives

Process overview (customer process)



Fleet Electrification Study incentives

- A path for every fleet type
- Incentive tiers based on vehicle make-up of fleet
- Incentives up to 100% of project cost

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.

Check for recent program changes and get up to date incentive information at

[EfficiencyWorks.org](https://efficiencyworks.org) or
business@efficiencyworks.org

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.*

Fleet assessment report

To the right is a list of minimum items to be addressed in the fleet report.

Minimum requirements:

- Total cost of ownership
- Simple payback
- Estimated emissions impact [MTCO₂ 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 combustion vehicles one-to-one with electric vehicles)
- Demand impact [kW] (The amount of demand required to replace the selected fleet of combustion vehicles one-to-one with electric vehicles)
- Whether it is anticipated that an electric service upgrade is needed
- State and Federal funding opportunities (list provided by EWB)

Service provider training opportunities



Additional opportunities for service providers

Selling Energy licenses

- Free access to Selling Energy, sales coaching resources
- License to on-demand, short videos on Selling Energy called “Selling in 6™”
- Five live webinars specific to Efficiency Works Business
- Monthly mastermind group coaching calls
- One-on-one proposal reviews with CEO Mark Jewell



Service provider development grant

- Find a great efficiency training and Efficiency Works will help pay for it
- Eligibility requirements
 - Listed SPs and energy management participants
 - Training must be relevant to EWB program offerings
- Apply online in service provider portal
 - Get preapproved for custom trainings
 - Submit proof of completion and invoice

Listed service provider	
Annual training maximum:	\$2,000
• Amount reimbursed:	50%
Minimum reimbursement:	\$75

Thank you!

Business@EfficiencyWorks.org
EfficiencyWorks.org



Estes Park | Fort Collins | Longmont | Loveland