



Commercial Streamlined Assessment and Small Business Energy Solutions

Assessment and implementation services for your business

Xcel Energy offers energy assessments to meet the specific wants and needs of your business. Please select one of our energy assessment options below and fill out the application to get started. If you have questions about our rebate programs or need help completing this application, please contact **877-287-2250**.

Please submit this completed form via email to **XcelEnergyEfficiency@clearesult.com**.

Energy Assessments – choose one

Please select one of the two energy assessment options listed below. For more information about which assessment best meets the needs of your business please refer to the Assessment Comparison Chart.

Commercial Streamlined Assessment – Xcel Energy's Commercial Streamlined Assessment program offers all size businesses an onsite ASHRAE level 1 assessment to strategically identify energy efficient capital improvements in their building. A customized energy report is provided after the assessment, and Customers will have access to complimentary implementation services to support identified energy projects. Complimentary direct installation of energy saving products are available for qualifying customers.

Cost:

Free – building size <50,000 square feet
 \$250 – building size 50,000–150,000 square feet
 \$500 – building size >150,000 square feet

Small Business Energy Solutions – Xcel Energy's Small Business Energy Solutions program offers small- and mid- sized customers (400 peak demand kW or less) an onsite assessment that identifies energy efficient, rebate-eligible equipment upgrades in their business. After the assessment, customers receive implementation services for the identified equipment upgrades of their choosing. Support includes, connecting customers with participating contractors, bid review and rebate qualification, as well as rebate paperwork and submission assistance. Complimentary direct installation of select energy saving products are available for qualifying customers with 100 peak demand or less.

Cost: Free; the services and implementation support provided through the Small Business Energy Solutions Program are free to qualifying small business customers.

Remote energy assessment option

Are you interested in the remote energy assessment option? Yes No

In an effort to better assist our customers, we offer remote assessment options for the two programs listed above. This option is great for businesses who prefer not to have an auditor on-site at their business. If you elect the remote assessment option, you will receive the same great benefits as the on-site assessment, but will be asked to perform your own business walk-through – with the guidance and support of our team. Using your smartphone and a URL based platform, an energy engineer will guide you through your business to identify key opportunities for energy efficiency improvements. Upon completion of the remote assessment, you will still be eligible to receive implementation services outlined in the program descriptions above.

Business customer information – required

Company name _____ Promo code _____

Service address _____ City _____ State _____ ZIP _____

Mailing address _____ City _____ State _____ ZIP _____

(If different from service address)

Contact person _____ Phone _____

Email* _____

*By providing your email address, you are granting Xcel Energy permission to send further emails regarding our programs and services.

Company premise numbers (from your Xcel Energy utility bill) _____

Type of services provided by Xcel Energy: Electric Natural gas Both electric and natural gas

For multiple buildings, please complete an application for each address as assessments will be preformed separately.

Business customer information – required

Building size (square feet) _____

Have you owned or occupied the building for more than 1 year? Yes No

Type of building:

Assisted Living Grocery/Convenience Healthcare/Outpatient Hospital Hotel/Motel Manufacturing
 Office Religious Building Restaurant Retail School Warehouse Other _____

Does your company own or lease the building?

Own Lease

Time remaining on lease _____ We are an IRS 501(c)3 nonprofit organization

If leased—please indicate which equipment maintenance/upgrades you are responsible for? (check all that apply)

Motors and drives Refrigeration Lighting Heating Cooling Compressed air All building systems

If leased, please provide the property manager's contact information:

Name _____ Phone _____ Email _____

Does your facility employ an energy manager? Yes No

Are you a franchise or chain?

No Yes If so, how many locations are owned/operated? _____

Which technology are you looking to receive an assessment for? (check all that apply)

Motors and drives Refrigeration Lighting Heating Cooling Compressed air All building systems

What is the primary reason for requesting an energy audit?

Improve building's ENERGY STAR® score Lower Utility Bills To meet city/county building performance ordinance requirement
 Equipment burnout Looking to make equipment upgrades within the next 6 months
 Other (please explain) _____

Does the building use an Energy Management System (EMS) or Building Automation System (BAS)? Yes – BAS Yes – EMS No

If yes, please provide the name of the system _____

Additional Building Information – optional

The questions below are designed to help our team gain a deeper understanding of your building to better assist you.

The building's heating system is:

Steam/hot water Electric Gas N/A (no heating system)
 Other (please explain) _____

The building's cooling system is:

Chilled water Direct expansion – rooftop units Direct expansion – split system (separate indoor and outdoor coils)
 Both chilled water and direct expansion N/A (no cooling system)
 Other (please explain) _____

Lighting in the building is: (check all boxes)

All LED Mostly LED Some LED No LED/Other Unknown

Is compressed air used in the building? (check boxes)

Yes No Unknown

Does the building have split system refrigeration equipment (i.e. walk-in coolers or freezers)? (check boxes) Yes No Unknown

Does the building use a central plant system? No Yes please complete the following:

(1) Who owns the system? Xcel Energy Business owner
 (2) What fuel is being supplied by the system? Chilled water Steam Both

877-287-2250

Colorado

Comments (Include any additional information here):

Customer signature – required

The information in this application is accurate and complete. I have read, understand, and agree to the terms and conditions and the Non-Disclosure Agreement sections of this application (on page 4). I understand that Xcel Energy will bill me the applicable audit price on my Xcel Energy utility bill after Xcel Energy has approved the final audit report. I authorize Xcel Energy to provide customer data, including utility account information and energy usage data, and any other information necessary, to the energy advisor, CLEARResult, for the purposes of providing services and support under the program.

Customer signature _____ **Title** _____ **Today's date** _____

Customers with a peak demand of 100 kW or less may qualify for the complementary direct installation of select energy saving products. Xcel Energy and/or CLEARResult may outsource the direct installation of specific measures to a partnering 3rd-party vendor. If identified as an eligible customer to receive these free direct installation services, your contact information; name, business name, business address, email and phone number will be provided to the 3rd-party installer so that they may reach out to you to schedule and perform direct installation of the identified energy saving measures. If you wish to decline this service please check the box below and sign below.

I decline this service, please do not share my contact information with the Direct Install vendor.

Third party release – optional (please sign below)

If you are working with a contractor or another entity and would like us to share your report with them directly, please sign below and indicate which party(ies) you would like to receive a copy of your report. Please note, the report provides information about your existing building systems and/or energy use data. By signing below, you are authorizing third-party access to view this data as it is presented in the report.

Contractor Building owner/property manager Other (specify) _____

Business name _____ Contact _____

Email _____ Phone number _____

An important step in completing an energy efficient upgrade project is to obtain competitive bids from qualified contractors. Our team can support you in these efforts by connecting you with participating trades who can bid and perform the work based off our findings and your project needs/interest. If requested, we will send 2-3 contractors (per segment - i.e.. lighting, HVAC, refrigeration, etc.) your contact information and/or audit report.

Are you interested in this service?

Yes, share my report and contact information Yes, but only share my contact information

No, but I am interested in receiving a list of participating contractors No, thank you!

Customer signature _____ **Title** _____ **Today's date** _____

Please send this completed application to XcelEnergyEfficiency@clearesult.com or
Energy Efficiency Specialists, Business Solutions Center, Xcel Energy, P.O. Box 8, Eau Claire, WI 54702-0008

Terms and conditions

- Commercial Streamlined Assessments and Small Business Energy Solutions Assessments (collectively referred to as “Programs”) are available to Xcel Energy electric and/or natural gas business customers.
- Participation in Commercial Streamlined Assessment is limited to once every Three (3) years per premise. Participation in a Small Business Energy Solutions assessment is limited to once a year per premise. Customers can only participate in one assessment within a given timeframe. Customers should work with program representatives to identify the best assessment for their business.
- Xcel Energy has contracted and authorized a vendor (“CLEAResult”) to perform on-site and remote assessments and/or install approved low- and no-cost measures at customer facilities.
- The customer acknowledges that participation in the Programs is voluntary.
- For on-site assessments, to support identification and implementation of energy efficiency measures, customer shall provide Xcel Energy and CLEAResult access to and egress from the facility during normal business hours.
 - a) In the event that any building system containing area is deemed inaccessible at the time of the scheduled site visit, CLEAResult has no obligation to return to the property to access those areas, and customer acknowledges that the report they receive may be incomplete.
- Direct Install Offering
 - a) Direct install measures include sink aerators, pre-rinse spray valves, pipe insulation, LED screw-in bulbs, LED exit sign retrofit kits, auto close doors, select LED tubes and strip curtains, and are available at no charge to qualified commercial customers with a peak demand kW under 100. Additional terms and conditions may apply.
 - b) As part of the AC rewards program Smart Thermostat equipment and install is available at no cost to eligible commercial customers. Terms and conditions apply.
 - c) It is the intent of the direct install component of the program to require minimal post-assessment return visits. If CLEAResult is turned away or asked not to install certain equipment, return visits are not guaranteed to be scheduled.
 - d) Xcel Energy and CLEAResult are not liable for any damage caused by the operation or malfunction of the installed equipment or measures taken
- Xcel Energy and CLEAResult do not guarantee that a specific level of energy or cost savings will result from any measures taken or products funded under these programs. Xcel Energy makes no warranties, expressed or implied, with respect to the measures suggested, equipment, operation, material, workmanship, or manufacturing associated with these Programs.
- The Programs’ reports may identify energy efficiency measures eligible for incentives under other Xcel Energy Programs (“Other Measures”). Customer is solely responsible for the selection of a third-party service provider (“Service Provider”) to complete the installation and implementation of any Other Measures. Customer acknowledges that any Service Provider selected by the customer is not an agent, contractor, or subcontractor of Xcel Energy or CLEAResult. Responsibility for delivery and workmanship related to any equipment or services the customer procures with a customer selected Service Provider exclusively rests with the Service Provider.
 - a) Xcel Energy and CLEAResult assume no responsibility for oversight of contractor services or for any claims the customer might have against the Service Provider, the manufacturer, the retailer, or the vendor with regard to the Other Measures implemented. Customer is encouraged to negotiate product warranties and appropriate insurance coverage with their selected Service Provider.
- Customers must submit documentation to Xcel Energy when measures have been implemented.
- Xcel Energy shall not be responsible for any tax liability imposed on the customer as a result of the payment of rebates.
- Xcel Energy is not responsible for the proper disposal/recycling of any waste generated as a result of a customer project.
- Xcel Energy’s conservation rebate programs are subject to 60 days notice of cancellation. The customer and contractor are responsible for contacting an energy efficiency specialist to determine whether these programs are still in effect and to verify program parameters. Call **877-287-2250** or email **Xcelenergyefficiency@clearesult.com**.

Non-disclosure agreement

The NDA section of this application is designed to allow building owners and/or it’s authorized agent to receive aggregated energy use data for their entire facility when the whole building energy use data contains at least four customers or tenants, which may include the property owner’s own account; and no single customer’s customer data, unless it is the property owner’s, comprises more than 50 percent of the whole building energy use data used to generate the whole building energy use data report. The utility data and other facility information provided in the energy assessment report is for the sole purpose of helping customers understand their facility systems, energy usage, and potential energy savings and DSM participation. Due to this, when a property owner or it’s authorized agent signs this application they agree to;

- not disclose whole building energy use data except for the purposes of building benchmarking, identifying energy efficiency projects, and energy management;
- take appropriate administrative, technical, and physical safeguards to protect the whole building data from any unauthorized use or disclosure to protect the data from unauthorized access, destruction, use, modification, or disclosure;
- only use the whole building energy use data for the purposes of building benchmarking, identifying energy efficiency projects, energy management, and complying with laws or ordinances;
- not attempt to determine an individual utility customer’s energy use from the whole building energy use data and not to use the information to contact the subject of the information;
- not use the whole building energy use data for a secondary commercial purpose not related to the authorized purpose without first obtaining the customer’s consent;
- destroy any whole building energy use data that is no longer necessary for the purpose for which it was transferred;
- not to permit access to the whole building data by anyone that has not agreed to abide by the terms pursuant to which the data was provided by Xcel Energy. This includes, but is not limited to, all interns, subcontractors, staff, other workforce members, and consultants; and
- agree that any recipient of the whole building data does not obtain any right, title or interest in any of the data provided by Xcel Energy.

Xcel Energy internal use only – Do not write in this space

Xcel Energy representative

 BSC Account Manager

(please include Xcel Energy Representative name, phone, email)

Customer's kW annual peak demand _____

Customer's DSM participation history (please include program name and year) _____

Customer's region (select one)

 Region 1: Denver-Boulder Region (Front Range and Denver Metro Divisions) Region 2: Northeast CO (Brush/Sterling/Greeley) Region 3: Mountain Division Region 4: San Luis Valley Division Region 5: Western Division

Comments: