



# Customized Solutions

Xcel Energy OID: \_\_\_\_\_  
Trade Partner ID: \_\_\_\_\_

## Proposal phase

Complete this section to initiate your customized solution proposal. Contact your Xcel Energy representative (account manager or one of our energy advisors) at 855.839.8862 or by email at [energyefficiency@xcelenergy.com](mailto:energyefficiency@xcelenergy.com).

### Customer information

Xcel Energy premises number \_\_\_\_\_ and/or \_\_\_\_\_  
Electric Gas

Company name \_\_\_\_\_ Date submitted \_\_\_\_\_

Installation address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Mailing address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
(for rebate if different from installation)

Customer contact name \_\_\_\_\_ Phone \_\_\_\_\_

Customer contact email\* \_\_\_\_\_ Fax \_\_\_\_\_

**Yes.** Share my project information with my vendor.  **No.** Don't share and I will be responsible for communicating project information to my vendor.

### Project description

Describe your project including details of energy savings measure (i.e. replace 70 hp 90% efficient motor with a 60 hp 93% efficient motor at a cost of \$500.)

**Customer signature** \_\_\_\_\_ **Date** \_\_\_\_\_

This signature is required from the individual tied to the Xcel Energy premises number herein. By signing here, I acknowledge the information in this application is accurate and complete. I confirm I have read, agree with and understand the terms and conditions on page 2 of this application. I also authorize Xcel Energy to provide a copy of the project preapproval notification to the equipment supplier or vendor so as to expedite the project process.

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

## Completion and verification phase

Complete this section after project completion (installed and operational).

No change—identical to the original proposal

There was a change in project. (Check all that apply.)  Scope  Technology  Cost

Description of the change:

**Alternative rebate recipient:** This section should be completed if there is a rebate recipient other than the company tied to the premises number noted in the Customer Information section. If this section is left blank, the rebate will be mailed to the company noted in the Customer Information section.

Company name \_\_\_\_\_ Contact name \_\_\_\_\_

Mailing address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Customer signature \_\_\_\_\_

**Customer signature** \_\_\_\_\_ **Date** \_\_\_\_\_

By signing here, I confirm that this project is completed (installed and operational). If the project installed varied from the original analyzed project submitted to Xcel Energy, then I have identified the changes.

**Xcel Energy account representative signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Date operational \_\_\_\_\_ Date verified \_\_\_\_\_

## Terms and conditions

Xcel Energy offers rebates on a wide variety of equipment and process improvements that lead to energy savings for all non-prescriptive rebate products and written preapproval from Xcel Energy is a precursor for all customized solution projects. This application initiates the review process. Supplemental project worksheets, equipment specifications and project cost will be required for Xcel Energy to conduct a comprehensive analysis of the customer's energy savings and utility cost-effectiveness. Xcel Energy issues a notification letter of preapproval or denial based upon a cost-effectiveness review. Preapproval letters represent a potential offer based on information provided by the customer or their representative agents. The completed project analysis by Xcel Energy confirms the final rebate offer.

### Eligibility

The customer must: 1) be a retail rate paying electric and/or natural gas business customer of Xcel Energy and 2) have not already ordered or purchased project related equipment prior to submitting this application.

### Starting your project (your proposal)

1. Contact your Xcel Energy representative (account manager or one of our energy advisors) to discuss and/or complete the project application form. Our energy efficiency specialists can be reached by phone at 855.839.8862 or by email at [energyefficiency@xcelenergy.com](mailto:energyefficiency@xcelenergy.com).
2. Submit your application and applicable documents to your Xcel Energy representative.
3. After an Xcel Energy engineering analysis, your Xcel Energy representative will notify you of your project approval/denial. In rare instances, monitoring of the existing project energy usage (baseline) and post installation will be required. You will be notified in writing if this is necessary.

### Finishing your project (your completed project)

1. Contact your Xcel Energy representative noted on your Xcel Energy preapproval letter.
  - a. You will need to note any changes and confirm that your project is completed (installed and operational) by signing the verification section on page 1 of this application.
  - b. You will need to submit project related invoices.
2. You should receive your rebate check within six weeks of submitting your completed project documentation.

### Preapproval

Written preapproval from Xcel Energy is a precursor for all customized solution projects and is defined by the date noted on the Xcel Energy preapproval letter. In some instances, the date noted on Xcel Energy funded study approvals; joint energy efficiency plans; or memorandum of understandings, will represent the preapproval date. Project purchase orders, contracts, equipment orders, equipment shipping and/or invoice dates that precede Xcel Energy's preapproval notification may exclude or invalidate all or portions of the project.

Customer project engineering costs may incur prior to the preapproval date to identify implementation alternatives. In these instances, the customer must notify Xcel Energy of these costs prior to or at the time of application submission, so we can include these costs as part of the project scope. Xcel Energy funded engineering study costs are not included as part of a customer's project cost.

The customized solution offer will remain available during the specified time frame noted on the preapproval letter. The completed project will be reviewed and analyzed by Xcel Energy upon receipt of full documentation. Xcel Energy acknowledges that savings and rebate projections may change over the course of the preapproval time frame, which could affect your initial project's feasibility. The most common reasons for projection changes include: changes in scope (selected different products), changes in quantity of equipment installed, or changes in incremental costs (+/- 10%). The aforementioned changes may result in an adjusted rebate offer. The incremental savings and costs are defined as the net difference between your baseline (less efficient situation) and the higher energy-efficient alternative.

Variables that may also affect projections include, but are not limited to: operating hours, load factor, efficiency ratings, cost-benefit analysis test failure, and simple payback parameters. Our analysis may differ if your vendor used different operating or technical assumptions, and/or different electricity or natural gas rates. They may also differ due to inclusion of state required cost-benefit analysis inputs.

### Program parameters

- Projects must pass the cost-effectiveness tests drawn from the California Standard Practice Manual which is approved by State regulators as the primary test used to evaluate the cost-effectiveness of programs included in Xcel Energy's Demand-Side Management (DSM) program.
- Project simple payback must be met.
- Projects must be completed (installed and operational) prior to the preapproval offer expiration time frame.
- Projects that are completed must submit their related documents and invoices within one (1) year of the operational date.
- Projects may not receive custom rebates in lieu of prescriptive rebates.
- Rebates are based on \$per kW saved and/or \$per Dth saved. They cannot exceed a percentage of incremental cost.
- Rebates apply to new equipment only. Leased equipment may qualify. Used equipment does not qualify.
- Rebates do not imply any representation or warranty of equipment, design or installation by Xcel Energy.
- Xcel Energy will issue rebates in the form of checks, not utility bill credits or other invoices.
- Xcel Energy shall not be responsible or liable for any personal, property or other damage caused by this equipment.
- Xcel Energy does not guarantee any energy savings. In any case, Xcel Energy's potential liability shall be limited to the amount of the rebate paid.
- Xcel Energy reserves the right to adjust the rebate amount based on projection changes.
- Xcel Energy reserves the right to perform pre- and post-installation energy testing or to request the customer to provide energy savings verification.
- Xcel Energy may provide a 60-day notice of change or cancellation to program rules, offer or product eligibility.
- Customers are responsible for verifying program availability and details online at [xcelenergy.com](http://xcelenergy.com) under Customized Solutions, or with their Xcel Energy account manager or energy efficiency specialists.
- Customers are responsible for ensuring that equipment installed for this program meets all applicable codes, standards and regulatory requirements.