

Xcel Energy OID

## STUDY FUNDING APPLICATION

### Preapproval Request

Complete this section to initiate your study rebate request for preapproval.

#### Study or system type:

- Recommissioning  
  Heating  
  Space/Process Heating  
  Lighting  
  Compressed Air  
  Fluid System \_\_\_\_\_ (type)
- Data Center  
  Cooling System  
  Other \_\_\_\_\_

#### Customer Information

Date submitted \_\_\_\_\_

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

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

Rate code \_\_\_\_\_

Customer contact name (PRINT) \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_

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

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

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

#### Study Provider Information

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

Contact name (PRINT) \_\_\_\_\_ Phone \_\_\_\_\_

Qualifications \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Email\* \_\_\_\_\_

### Study Description

Type of space \_\_\_\_\_ Square Feet \_\_\_\_\_

kW of square footage of area or system to be studied \_\_\_\_\_ kWh of square footage of area or system to be studied \_\_\_\_\_ Dth of square footage of area or system to be studied \_\_\_\_\_

Measures included in scope of study \_\_\_\_\_

Potential energy savings as a percentage of annual consumption. KW \_\_\_\_\_ KWh \_\_\_\_\_ Dth \_\_\_\_\_ Cost of study \_\_\_\_\_

Study provider signature \_\_\_\_\_ Date \_\_\_\_\_

This signature is required from the study provider responsible for completing the study work and report. I acknowledge the information in this application is accurate and complete. I confirm I have read, agree with and understand the terms, conditions, responsibilities in this application, and will produce a study according to the study work scope section of the application. We will not expect customer payment until Xcel Energy has approved our final report. Cost of study will not exceed quoted price without additional notice to the customer and Xcel Energy. Cost changes may impact study funding.

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 rules and requirements in this application. I also authorize Xcel Energy to provide a copy of the project preapproval notification to the study provider named herein so as to expedite the study process.

\*By providing your email address, you are granting Xcel Energy permission to send further emails regarding our programs and services. Providing your email address also ensures faster delivery of your preapproval letter, expediting the rebate process.

### Complete Study Payment

Complete this section after study is complete and approved by Xcel Energy.

Customer contact name (PRINT) \_\_\_\_\_ Phone \_\_\_\_\_

List of attendees \_\_\_\_\_ Final study cost \_\_\_\_\_

**Alternative rebate recipient:** If there is an alternative recipient—to someone other than the company tied to the mailing address premises number noted with the Business Customer information section—then this section must be completed also. If this is left blank, the rebate will be mailed to the company noted in the customer information section.

Customer signature \_\_\_\_\_ Contact name \_\_\_\_\_

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

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

By signing here, I confirm that I have paid the provider for the study, the study was approved by Xcel Energy and presented to me by the study provider and alternate rebate information is accurate.

Xcel Energy Account Manager Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## STUDY FUNDING

**Study Rebates Eligibility Requirements and Process**

Xcel Energy will provide a study rebate to help eligible customers identify and implement energy-saving opportunities. Xcel Energy will rebate up to 75 percent of the cost of the study, not to exceed \$25,000. (Process and Commercial Efficiency programs may differ, refer to program rules for details.) In order to receive a rebate, the study must be preapproved and a study rebate form must be submitted no more than three months after the study is approved by Xcel Energy. To obtain Xcel Energy rebate preapproval for a study, a customer and the selected study provider should complete this form and attach a proposal addressed to the customer.

**Study preapproval**

To obtain Xcel Energy rebate preapproval for a study, the customer and study provider should follow the steps below.

Please submit the following to Xcel Energy at the preapproval application phase:

1. Study application with completed preapproval section
2. Copy of the study proposal from the study provider. The proposal should provide descriptions of the building/space and the energy impact measures that will be investigated. The proposal should address the following items:
  - a. What are the existing systems included in this study?
  - b. What are the customer's concerns, issues, or problems that were discovered during the walk through?
  - c. What are the preliminary recommendations to be proposed in this study based on the initial walkthrough? (Recommissioning requires Addendum A)

**Study approval**

Study provider submits completed study electronically to Xcel Energy with:

1. Completed study
2. Energy calculations
3. Completed energy conservation opportunities (ECO) form
4. Completed addendum A (Recommissioning only)
5. Copy of recommissioning calculator tool (Recommissioning only)

Upon Xcel Energy approval of the final study, the study provider should send a final copy of the study and the invoice to the customer and the Xcel Energy account manager. After the study is approved, the study provider should invite the Xcel Energy account manager to the final report presentation meeting.

To receive the study rebate, the customer should sign the Completed Study Payment section of this application and submit it with a copy of the paid invoice to Xcel Energy within three months of the final report presentation meeting.

**Terms, Conditions and Responsibilities**

Requirements: The purpose of the Study is to provide a customer with the necessary business case justification to gain approval to implement the energy-saving opportunity. Refer to program requirements on [xcelenergy.com](http://xcelenergy.com).

1. Study rebates available to Xcel Energy business customers in Minnesota (electric and/or natural gas).
2. Individuals with proven experience, appropriate to the type of study being performed must be responsible for conducting the study.
3. The Engineering firm performing this study must do so with impartiality towards equipment suppliers, distributors, and all equipment or product brand names.
4. The Study must be performed according to the Study Work Scope available online at [xcelenergy.com/TradePartners](http://xcelenergy.com/TradePartners).
5. Xcel Energy makes no warranties regarding the study. All such warranties are between the Engineering Firm and the customer. Rebate qualifications do not imply any representation or warranty of the Study by Xcel Energy.
6. Xcel Energy's decision relating to customer eligibility for the study or other issues will be final and binding for all parties.

7. The customer shall be responsible for directing the work of the consultant or the contractor; at no time shall the consultant or contractor be considered an agent, employee or a contractor of Xcel Energy.
8. The study must be completed within three (3) months of the Xcel Energy Funding Authorization Date.
9. Xcel Energy reserves the right to perform pre- and post-installation energy testing and data collection.
10. Xcel Energy reserves the right to accept or reject any application, study, or portion thereof.
11. Xcel Energy will pay study rebate upon customer payment of study to engineering firm.
12. Rebate is only available if Xcel Energy has preapproved the study application prior to completing the study and has approved final study.
13. The rebate will not be paid until after the engineering firm presents the study to customer.
14. Rebate must be applied for within three (3) months of study presentation.
15. Actual rebate amounts subject to review by Xcel Energy.
16. Xcel Energy's conservation rebate programs are subject to 60 days notice of cancellation. The customer is responsible for checking with the Business Solutions Center at 1-800-481-4700 to ask whether or not the program is still in effect and to verify program parameters.
17. Xcel Energy reserves the right to conduct inspections of installation and/or make a reasonable number of follow-up visits to customers' facility to verify savings estimates and/or measure implementation.
18. Xcel Energy reserves the right to limit future study rebates if customer fails to turn in completed paperwork after the opportunity has been completed and/or the customer doesn't implement measures from past studies.

**Study work scope****A - K**

Study provider is responsible for understanding these requirements. Find a detailed description of the requirements online at [xcelenergy.com/TradePartners](http://xcelenergy.com/TradePartners).

- A. Executive summary
- B. Introduction
- C. Study summary
- D. Project description
- E. Energy estimate
- F. Measurement of energy
- G. Non-energy project impacts
- H. Project costs/vendor quotations
- I. Financial analysis
- J. Implementation
- K. Other cost savings

Refer to study work scope and program specific requirements posted online at [xcelenergy.com](http://xcelenergy.com).