



Self Directed Custom application

The Self-Direct Custom Energy Efficiency program will provide large commercial and industrial electric customers in Colorado the opportunity to self-fund energy conservation projects at their facilities. Customers who engineer, implement and commission qualifying projects can receive increased rebate levels to offset their costs of implementation. The dollar value of these rebates will be based on the amount of energy savings attained.

Business customer information

Company name _____ Date submitted _____ Opportunity ID _____

Billing address _____ City _____ State _____ ZIP _____

Facility address (if different) _____ City _____ State _____ ZIP _____

Contact name _____ Phone _____ Fax _____

Contact email* _____

Xcel Energy premises number _____

Send rebate check to: Billing address Facility address Alternate rebate recipient (see below)

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

Project contact (if different) Name _____ Phone _____ Fax _____

Sign here if you'd like us to send a preapproval letter to the equipment supplier listed on page 2: _____

Alternate 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 _____

Account manager information

Account manager _____ Email _____@xcelenergy.com

Phone _____ Fax _____ Check account manager business group BSC Account manager

Sales engineer _____ Phone _____

Self-Direct Custom Efficiency project completion verification

Completed project information (please check)

- Operation verified on-site
 Operation verified by phone
 Project installed matches what was analyzed at the preapproval stage
 Copies of all purchase invoices
 Updated TRC calculatory results, following your project's M&V analysis

Customer signature _____ Date _____

By signing here, I confirm that this project is installed and operational. If the project installed varied from the project analyzed in the preapproval application, I have noted the changes on

Xcel Energy account manager signature _____ Date _____

This project is installed and operating. The Xcel Energy account manager's signature above verifies that the installation is complete and copies of the invoice(s) from the customer are attached. If the application and installation are complete, Xcel Energy will issue a rebate.

Program prequalification requirements

Xcel Energy offers the Self-Direct Custom Efficiency program to qualified commercial and industrial customers who have an aggregate peak demand at all meters of at least 2 MW in any single month and an aggregate annual energy usage of at least 10 GWh. The customer of record must be the same for all meters aggregated to qualify for this prequalified program. The customer will provide a list of their premises numbers that meet this requirement.

With this program you, the customer, perform the design, engineering, measurement, verification and reporting work associated with the energy efficiency projects.

Contact your Xcel Energy account manager to confirm your eligibility.

Program procedures

1. Prequalification

- Your organization will be prequalified by Xcel Energy if all eligibility requirements for the program are met (see program qualification requirements)

2. Preapproval

- Energy efficiency opportunities are identified within your organization
- Project Application submitted including:
 - Completed self-directed custom preapproval application (page 1)
 - Detailed proposal of your energy efficient improvement plan (see project application guide)
- Notification of Project Preapproval
 - Letter is signed stating your intent to implement the preapproved measures and M&V plan
 - Your organization will be notified of approval/denial of the application from Xcel Energy.
 - Xcel will confirm your requested rebate amount.
 - Monitoring plan will be finalized to verify actual results

3. Project implementation

- Pre-installation monitoring is conducted and the data is forwarded to Xcel Energy
- Xcel Energy must approve data before implementation can begin
- If approval is attained, the project can proceed

4. Project completion report

- Your organization will need to submit a project completion report once all project elements have been completed (see project completion report guide)

5. Rebate will we finalized

- Upon Xcel Energy's approval of your project completion report, a rebate check will be issued

Project application

The format of the project application will be determined by the customer, but at a minimum must include the following components. **Please denote the page number from your proposal where each section can be found.**

Page number on report	Application content requirements
_____	<p>Description of the customer including:</p> <ul style="list-style-type: none"> • Electric and gas rate classifications • Business activities at involved sites • Roles of personnel involved in the project • History of and expertise with conservation projects
_____	<p>Description of the proposed project(s) including:</p> <ul style="list-style-type: none"> • Technology • Locations • Implementation schedule • Expected measure life • How the projects fit into the customer's operations • A description of previous implementations of similar technology or projects <p>The project description should include product specification sheets, white papers, quotes from vendors to validate cost estimates, and other supporting documentation. Self-Direct project application may contain a single measure, or a combination of multiple measures at a single or multiple locations. All energy conservation measures must be at customer locations receiving electric service from Xcel Energy</p>
	<ul style="list-style-type: none"> • For new buildings, the application must contain computer energy modeling specific to the planned building to forecast the base case and efficient energy use. Computer modeling should be in accordance with the protocol specified in the Energy Design Assistance program
	<ul style="list-style-type: none"> • Engineering calculations to forecast energy and demand savings, non-electric energy benefits associated with energy efficiency savings and costs, and the estimated rebate
	<ul style="list-style-type: none"> • Cost benefit calculations to determine the Total Resource Cost (TRC) Test, including a discussion of the sensitivity of the TRC and payback to various inputs, and the perceived accuracy of the inputs. Xcel Energy will provide the TRC calculator for your analysis. Do not include shipping charges or taxes in cost benefit calculation.
	<ul style="list-style-type: none"> • Description of the controls the customer will use to reduce the likelihood of project cost and schedule overruns
	<ul style="list-style-type: none"> • Description of the proposed monitoring activities that will be used to document demand and energy savings. Pre- and post-installation measuring and verification will be required for all projects with predicted energy savings greater than 0.25 GWh unless Xcel Energy and the customer agree upon other methodology. This M&V should be performed in accordance with the International Performance Measurement and Verification Protocol guidelines. Xcel Energy reserves the right to require measurement and verification on projects of any size.
	<ul style="list-style-type: none"> • Any information reasonably requested by Xcel Energy to document and support the application

Project completion report

The customer will determine the format of the project completion report, but at a minimum it must include the following components. **Please denote the page number from your proposal where each section can be found.**

Page number on report	Completion report content requirements
	Description of all deviations from the application package including equipment substitution, cost adjustments, operating procedures, etc.
	Documentation of actual costs incurred including invoices, internal labor, incremental operation and maintenance costs. Do not include shipping charges or taxes.
	Raw monitoring results and engineering calculations to demonstrate actual energy and demand saving based on pre and post-monitoring results
	A total resource cost (TRC) analysis greater than 1 (Xcel Energy provides the calculator)
	Simple payback on measures. Must be between one and 15 years. Can bundle projects for payback and TRC
	Lifetime of the measures implemented
	Incremental customer peak kW reduction
	Xcel Energy peak coincidence kW reduction at the meter(s) (Xcel Energy provides the calculator)
	Incremental customer kWh reduction
	Incremental capital cost
	Incremental operations and maintenance (O&M) costs
	Requested rebate amount
	Any information reasonably requested by Xcel Energy to document and support the completion report