

Custom Technical Assistance Proposal

Program Ally Information

Company Name:

Contact Name:

Email:

Phone Number:

Qualified Program Ally Status: ☐ Yes ☐ No

Note: Only qualified Program Allies are eligible to receive TA incentives.

Customer and Facility Information

Customer Name:

Facility Address:

Facility Name:

Facility Type:

Facility SqFt:

Operating Hours:

Annual Facility Consumption (kWh):

Annual Facility Consumption (therms):

Primary Energy Sources Used:

☐ Electric ☐ Natural Gas ☐ Other (please specify):

Existing Conditions

Provide a brief description of the current building systems, operations, and relevant equipment:

Potential Energy Efficiency Measures

List the potential measures to be assessed as part of the Technical Assistance study:

Description of Study

Studies may include targeted or comprehensive energy studies, energy audits, M&V (plans and implementation), energy modeling, and other TA efforts that support customer decision making.

Type of Study (select all that apply)

- ☐ Targeted Energy Study
- ☐ Comprehensive Energy Study
- ☐ ASHRAE Level 2 Audit
- ☐ M&V Plan
- ☐ Energy Modeling
- ☐ Other (describe):

Scope and Purpose of TA Study

Describe the intent of this study, how this study supports customer decision-making and what it will include.

Deliverables

E.g., report with savings estimates, measure recommendations, cost analysis, model files, M&V plan, etc.

Savings Estimate

Provide preliminary savings estimates (if available):

Estimated Annual kWh Savings:

Estimated Demand kW Savings:

Estimated Annual Therm Savings:

Other Savings (e.g., water, demand, etc.):

Calculation Methodology

Describe the method(s) to be used to estimate savings: spreadsheet tools, simulation software, engineering calculations, etc.

Customer Commitment

Has the customer provided a commitment to pursue implementation if the project is viable?

☐ Yes ☐ No

Note: Projects that do not move forward to installation are not eligible for TA incentive reimbursement.

Expected Timeline for Installation:

Expected Completion Date:

Estimated Cost of TA Study

Total TA Study Cost:

TA Incentive Requested:

Maximum of \$0.03/kWh or \$10,000, whichever is less.

Acknowledgements

☐ I understand that technical assistance incentives will only be paid upon installation and completion of a qualifying custom project. Projects that do not move forward to installation and completion will not be eligible for TA incentives. Program allies are strongly encouraged to secure customer commitment before initiating the TA study.

☐ I confirm that this study will not move forward without prior Program Manager approval.

☐ I certify that all information provided in this proposal is accurate to the best of my knowledge.

Authorized Representative: _____

Title: _____

Signature: _____