



Providing Custom Incentives Existing Buildings Program

April 8, 2026

Agenda

What is a Custom Project?

Qualifying Incentives

Custom Studies and Analyses

Program and Ally Collaboration

Example Custom Projects & Incentives



Trade Ally Forum Mission Statement

“

Connecting trade allies to the resources and support they need for long-term success in their communities.

”

Delivering Custom Incentives to Utility Customers

Utility Customer Eligible Incentives

Prescriptive

- Standard incentives, reliable savings, repeatable assumptions.

Multi-variable

- Common measure, variable savings, predictable assumptions.

Unique & Interactive

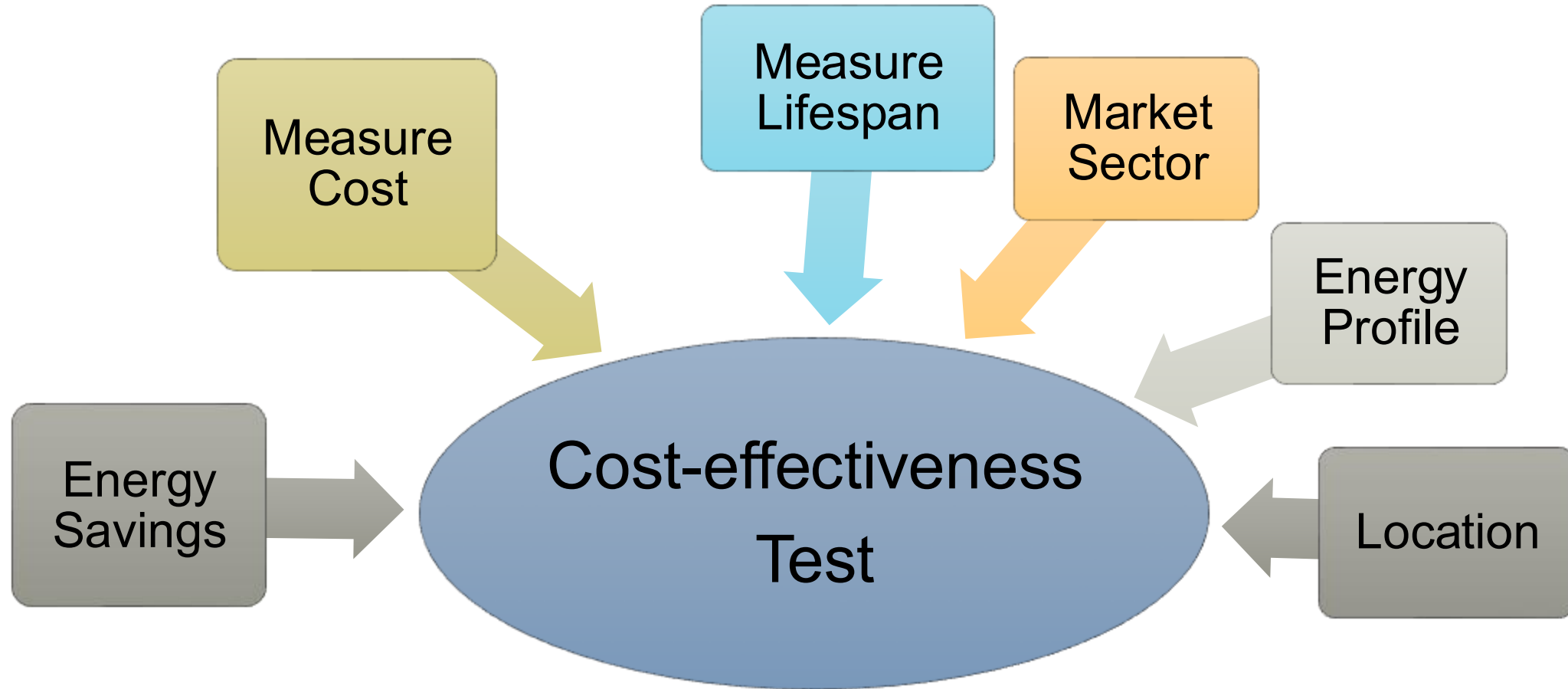
- Custom measure, savings unique to project, full analysis required.

Applied for **after** installation – Form 120P

← Custom

Require an analysis and offer **before** purchase/installation.

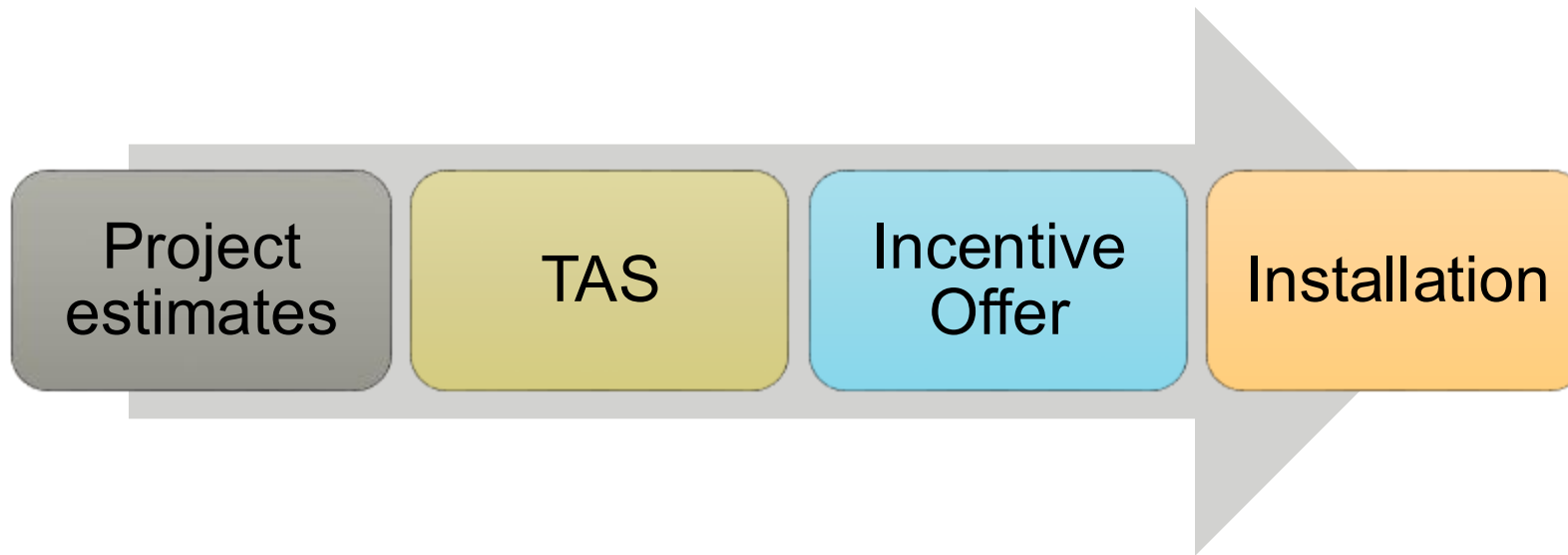
Requirements for cost-effective incentives



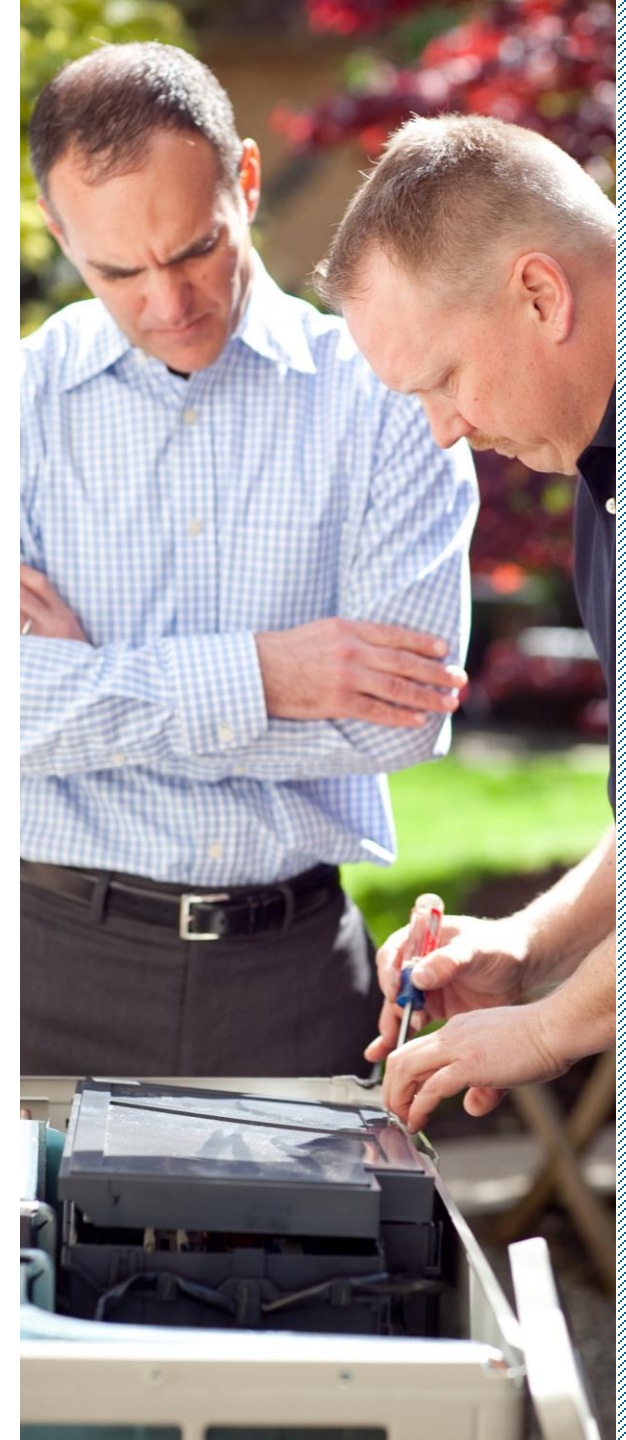
If a measure is cost-effective, it may be eligible for an incentive.

Custom Projects & TAS

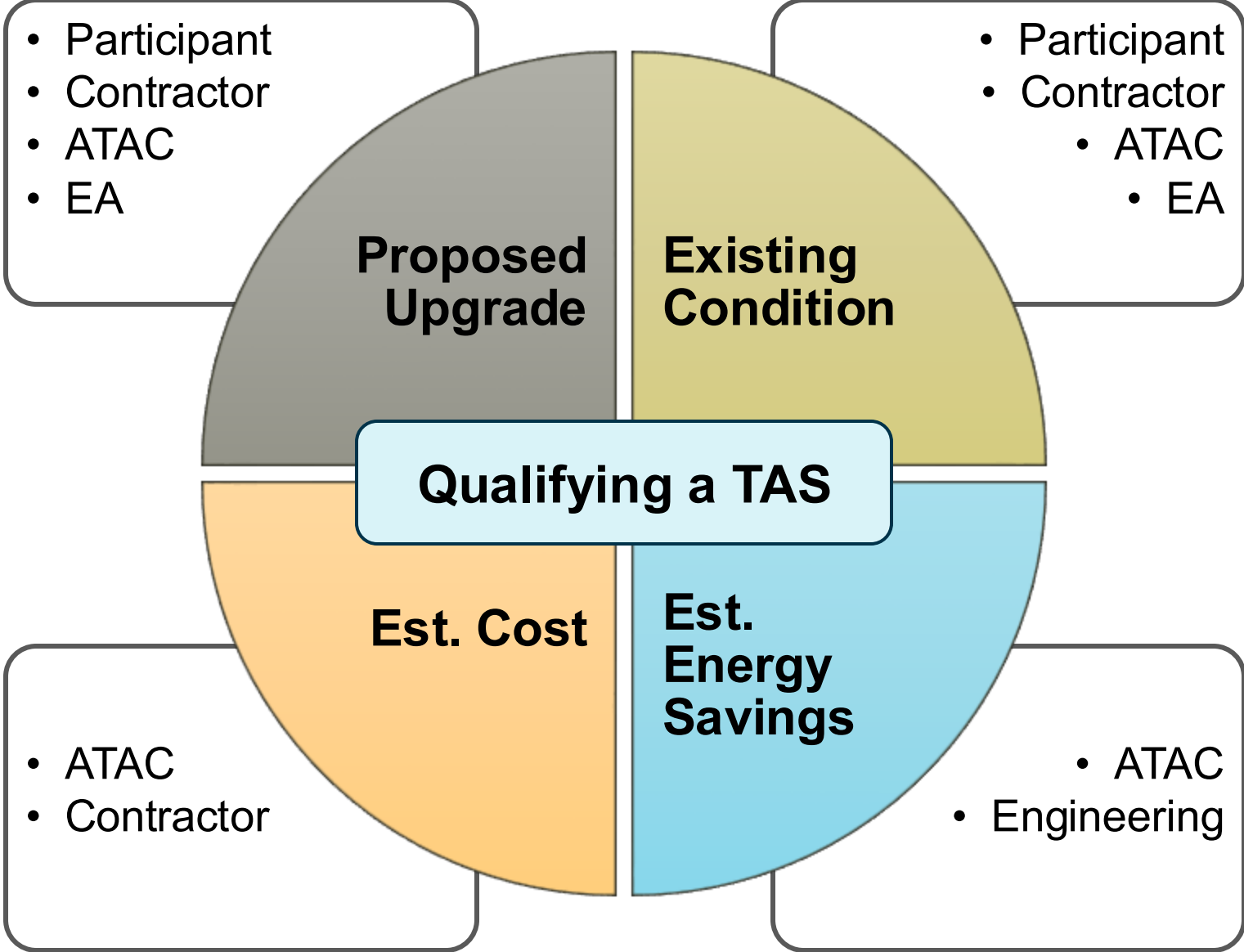
- A Technical Analysis Study (TAS) delivers accurate Energy Efficiency Measures (EEMs)



- Energy Trust can incentivize up to 90% of eligible project costs at **\$5 per therm and \$0.45 per kWh** saved, annually.



Project Qualification & Responsibility

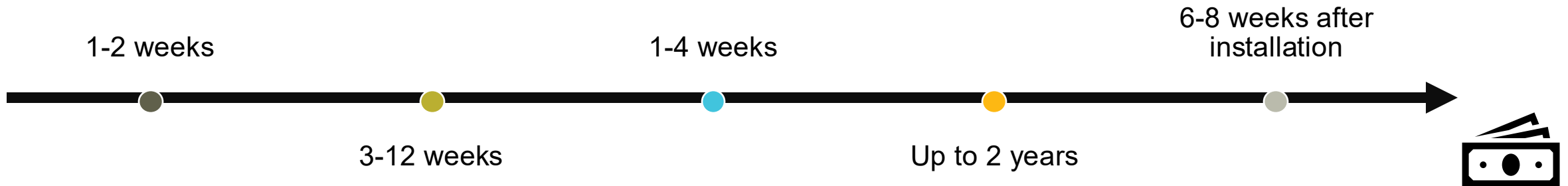


Program & Ally Collaboration

- Everyone contributes to custom project success
- Early communication is helpful
- TAs often have information needed to qualify a project
- EAs and TACs can help facilitate information



Project Process



Common Project Delays

- **Data gaps delay assessments**

- Engineering needs nameplates, setpoints, HVAC schedules, and mechanical drawings to calculate energy savings; missing information halts progress.

- **Late Energy Advisor involvement**

- When EAs aren't engaged early, project setup takes longer and required steps like the enrollment Form 100E cause avoidable delays.

- **Poor communication stalls projects**

- Slow or absent responses from participants and contractors are a leading cause of project standstills.

Successful project communication

- **Engage early, especially if uncertain**

- Energy Advisors welcome early conversations with contractors and participants, even for projects that may seem unfeasible.

- **EAs bridge the team**

- Energy Advisors connect contractors and participants directly with engineering to align on project details and required information.

- **Share everything upfront**

- Providing project scope, spec sheets, costs, and site/equipment details early makes energy savings calculations faster and more accurate.

- **Motivate customers to participate**

- Encouraging customers to help gather information and supporting site walks with TAs ensures engineering has what it needs to move forward.

Custom Project Examples

EXAMPLE 1

Public School Boiler

EEM DESCRIPTION

Boiler lockout and scheduling controls

PROJECT LENGTH

68 DAYS

PROJECT SAVINGS

1,532 Therms

PROJECT COST

\$5,096

PROJECT INCENTIVE

\$4,587

NOTES

- Started as prescriptive, EA saw controls listed on the quote.
- Engineering needed existing equipment, gas usage profile, schedules, setpoints, and specs.
- Request for Information: ~32 days to collect
- Analysis and calcs: 35 days, delayed by obtaining cost estimates

EXAMPLE 2

Religious Assembly Building

EEM DESCRIPTION

Replacement of failed and leaking steam valve.

PROJECT LENGTH

31 DAYS

PROJECT SAVINGS

431 Therms

PROJECT COST

\$3,500

PROJECT INCENTIVE

\$2,155

NOTES

- Opportunity identified by Energy Advisor
- Engineering needed steam system specs, schedules, setpoints, equipment, and leak information.
- Request for Information: ~14 days to collect
- Analysis and calcs: 3 days

EXAMPLE 3**Hotel****EEM DESCRIPTION**

74 Smart Thermostats with occupancy-based detection serving PTACs/PTHPs

PROJECT LENGTH

21 DAYS

PROJECT SAVINGS

46,750 kWh

PROJECT COST

\$18,425

PROJECT INCENTIVE

\$16,853

NOTES

- Smart Thermostats in lodging are not prescriptive incentive eligible
- Engineering needed PTAC/PTHP specs, room characteristics and scheduling.
- Request for Information: 10 days
- Analysis and calcs: 2 days

EXAMPLE 4

Small Business Office

EEM DESCRIPTION

Add R-30 insulation to 2,164 SF to floor crawlspace. Uninsulated prior

PROJECT LENGTH

68 DAYS

PROJECT SAVINGS

374 Therms
240 kWh

PROJECT COST

\$5,245

PROJECT INCENTIVE

\$1,978

NOTES

- Prescriptive incentives do not cover floor insulation – low project volume.
- Engineering needed existing envelope, HVAC setpoints, schedules, and floor area.
- Request for information: ~30 days
- Analysis and calcs: 4 days

EXAMPLE 5

Municipal Parks & Rec Building

EEM DESCRIPTION

Replace constant speed pool recirculation pumps with variable speed recirculation pumps

PROJECT LENGTH

87 DAYS

PROJECT SAVINGS

14,444 kWh

PROJECT COST

\$4,198

PROJECT INCENTIVE

\$3,778

NOTES

- Energy Advisor recognized the energy saving opportunity
- Engineering needed information about the pumps, pool system, schedules, setpoints, and equipment.
- Request for Information: ~55 days
- Analysis and calcs: 8 days

EXAMPLE 6**Laundromat****EEM DESCRIPTION**

High-efficiency tankless water heaters serving washing machines

PROJECT LENGTH

27 DAYS

PROJECT SAVINGS

703 Therms

PROJECT COST

\$9,514

PROJECT INCENTIVE

\$3,515

NOTES

- Standard incentive expired at the end of 2025 project would not complete by the deadline.
- Expired or adjacent prescriptive measures may qualify for custom incentives
- Request for Information: 10 days
- Analysis and calcs: 7 days

Interested in learning more about our
custom incentives?



**Scan the QR code to check out
the custom incentive website.**



Thank you

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