



Request for Technical Assistance

INTRODUCTION

Efficiency Maine's Commercial and Industrial (C&I) Custom Program provides funding for Technical Assistance (TA) Studies to help program participants lay the necessary groundwork for project investment. The Program incentive is **50% of the approved TA Study cost up to \$25,000**. Eligible TA Studies include investment-grade analysis of large and more complex projects, as well as development of systems designs and preparation of construction bid documents for targeted measures. Additionally, Efficiency Maine will support interconnection applications and studies required for battery projects that are applying for an incentive through the Energy Storage System (ESS) Program Opportunity Notice

Funded TA Studies must focus on complex projects that require engineering to proceed, and that are found likely to be eligible for Custom Program or ESS Program funding. All award decisions will be made by Efficiency Maine based on a review of potential project eligibility, alignment with Program goals, and a preliminary cost effectiveness screening. Examples of potentially eligible studies include: custom process improvement upgrades, large or complex beneficial electrification or HVAC projects, and battery system designs.

\$200,000 is being initially allocated to this program for the remainder of the 2024 fiscal year (July 1, 2023 through June 30, 2024).

GENERAL GUIDELINES

1. The TA Study must be conducted by a professional who has demonstrated experience with the technology under consideration. Efficiency Maine must approve the person or firm conducting the TA Study *prior* to starting the study. This entity is known as the "TA Provider".
2. Studies must focus on specific projects that propose to reduce grid-supplied electricity, facility on-peak electric demand, or fuel use.
 - If proposed, building or system computer simulation tools must be approved in advance.
3. Efficiency Maine will only award funding to those projects where an initial feasibility assessment indicates there is a likelihood of a cost-effective project that would meet the eligibility requirements of the C&I Custom Program or the ESS Program Opportunity Notice.
4. Scoping audits and whole building designs of new construction buildings are not eligible
5. Efficiency Maine will seek assurances from the customer that the project is likely to be implemented if the TA study returns favorable results.
6. Efficiency Maine requires that the final TA Study deliverables result in actionable analysis and system designs.
7. In all cases, Efficiency Maine will perform a technical review of the study deliverables prior to TA payment.
8. Efficiency Maine reserves the right to reject any proposal that does not advance the goals of the C&I Custom Program or ESS Program Opportunity Notice in effect at the time the application is submitted.

APPLICATION REQUIREMENTS

The TA Study application must include:

1. A brief narrative description of the site and proposed measure(s).
2. A description of the proposed study scope, methodology, deliverables and timeline.
3. A “not to exceed” cost of the study, including a description of how the study cost is derived.
4. A high level estimate of the proposed measure cost and enough information to estimate the energy savings in order to complete the feasibility assessment of cost effectiveness.
5. A statement of corporate or individual qualifications demonstrating past experience with the proposed technology(ies) and the capabilities of the individual(s) who will conduct study.
6. A copy of the Request for Technical Assistance Application (final page of this document) signed by the customer.
7. For interconnection studies, a copy of the completed interconnection application.

TA STUDY DELIVERABLES

TA Studies must result in a defined deliverable that should be documented by the proposed scope of work.

Eligible studies must generally fall into one of three categories:

1. Investment-grade analysis of large and more complex projects.
2. Development of system designs and preparation of construction bid documents for targeted measures.
3. Battery system designs and interconnection applications

TA PROCESS STEPS

1. The customer and/or TA Provider provide Efficiency Maine preliminary estimates of measure costs and energy impacts in order to determine cost effectiveness. These preliminary estimates could also come from an Efficiency Maine scoping audit.
2. If cost effectiveness found positive, customer and TA Provider submit a TA Study application.
3. Coordinate a TA Study kick off meeting between the customer, TA Provider, and Efficiency Maine in order to clearly define the study scope, and agreed upon deliverables.
4. The Efficiency Maine representative reviews the TA Study application package and, if applicable, recommends award of the TA incentive to the Efficiency Maine Program Manager. The Efficiency Maine representative communicates the final decision to the customer and the TA Provider.
5. The customer authorizes the TA Provider to proceed with the study. The Efficiency Maine representative remains engaged with the process to address questions and provide input, guidance, and assistance as necessary. The TA provider must inform Efficiency Maine of any changes in the TA Study scope of work as soon as they are known.
6. Once the TA Study is complete, it is submitted to Efficiency Maine for review.
7. Efficiency Maine reviews the study to confirm the agreed-upon deliverables are completed.
8. Efficiency Maine requests clarification or elaboration, if appropriate.
9. Efficiency Maine issues TA incentive award.

COMMERCIAL & INDUSTRIAL CUSTOM PROGRAM Request for Technical Assistance



PROGRAM PARTICIPANT INFORMATION

Company Name:

Mailing Address:

City/Town:

State:

Zip Code:

Project Address:
(if different from above)

City/Town:

State:

Zip Code:

Contact Name/Title:

Email:

Telephone:

Fax:

Federal Tax ID:

Utility/Utilities Servicing Facility:

Applicant Signature:

Date:

TECHNICAL ASSISTANCE PROVIDER INFORMATION

Company Name:

Mailing Address:

City/Town:

State:

Zip Code:

Contact Name/Title:

Email:

Telephone:

Fax:

Reserved for Efficiency Maine Use

APPROVAL OFFER

Approved Funding Amount:

Approval Date:

Expected Completion Date:

Efficiency Maine Technical Reviewer:

Signature:

Date: