

# Case Studies 2020

Commercial

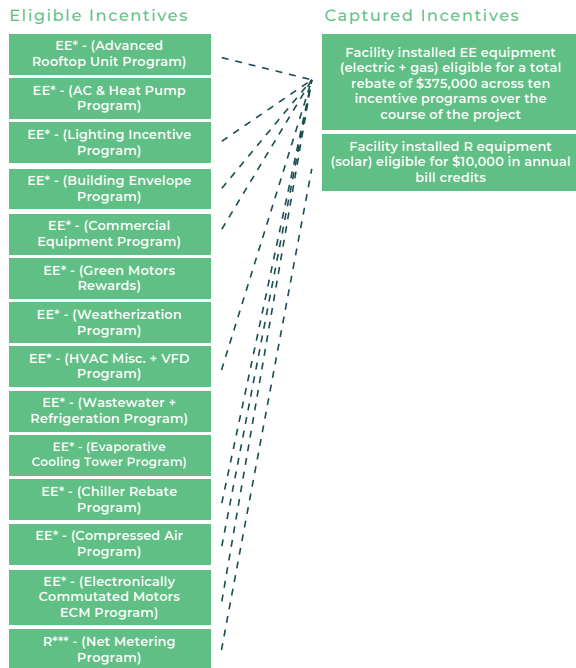


# Public Medical Office Building (Existing Building)

Utah

A 350,000 square foot public medical office building in an urban area required a substantial upgrade to its mechanical systems. These upgrades were inspired both by the age of the asset as well as by COVID prevention measures. Mechanical system upgrades also included incorporating energy efficient measures. The project’s engineering firm engaged IncentiFind early on to identify cost-saving incentives since the scope was expanded beyond the planned capital improvement budget.

IncentiFind presented 14 utility incentive programs which influenced equipment specifications in the design. Local renewable energy standards required rooftop PV solar panels. IncentiFind’s APPLY Services team managed the applications for the below incentives behalf of the owner.



(\*EE - energy efficiency)  
 (\*\*WC - water conservation)  
 (\*\*\*)R - renewables

Cost-Savings From Incentives: **\$385,000**  
 (Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **3 years**

# Non-Profit Organization (New Construction)

## Charlotte, North Carolina

**T**his 40,000 square foot space that will serve animals is on schedule to break ground in Q1 2021. To stretch their donation dollars, the non-profit engaged IncentiFind to identify all cost-saving incentives available to the project scope. This organization also aims to achieve Environmental-Sustainability goals on every project. IncentiFind was engaged early on the planning and design stage to influence equipment specifications in order to reap more incentive dollars and still achieve the organizations Environmental- Sustainability goals.

As with all new construction projects, IncentiFind viewed at the project holistically, site and structure. IncentiFind found and connected the customer to grants and financing programs they were initially unaware of. IncentiFind's APPLY Services will be leveraged to capture all eligible incentives.

### Eligible Incentives

- EE\* - (HVAC Program)
- EE\* - (Commercial Equipment Program)
- EE\* - (Custom Program; VFD's, AHU's, Energy Mgmt. System)
- EE\* - (LED Lighting Program)
- WC\*\* - (Best Management Practice Grant)
- R\*\*\* - (Solar Energy Tax Exemption)
- Other - (EV Charging Station Rebate)
- Other - (Recycling Grant, County Loan Program)

### Captured Incentives

- Contractors eligible for \$12,000 in Midstream Instant Rebates
- Non-Profit installed EE equipment (electric) eligible for a \$50,000 rebate
- Non-Profit awarded Water Conservation BMP Grant for \$15,000
- Non-Profit awarded the Recycling Grant in the amount of \$7,500

(\*EE - energy efficiency)  
(\*\*WC - water conservation)  
(\*\*\*R - renewables)

Cost-Savings From Incentives: **\$84,500**  
(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **15 months**

# Master Planned Community (New Development)

## California

**T**his 700-acre development has eight distinct neighborhoods that is a “zero carbon community”. IncentiFind worked with the developer to identify all home model types and selections. IncentiFind then performed a whole home approach, looking at all energy efficiency (indoor and outdoor), water conservation (indoor and outdoor), and renewables (solar) where applicable.

Lastly, the owner leveraged IncentiFind’s APPLY Services to manage applying and capturing all incentives.

### Eligible Incentives

- EE\* - Holistic HERS Rating Program
- EE - EnergyStar Appliances
- EE - LED Lighting
- EE - HVAC System
- EE - EnergyStar Roofing & Insulation
- R\*\*\* - Solar Water Heating Program
- R - PV Solar Net Metering Program
- WC\*\* - WaterSense Plumbing Fixtures
- WC - Rainwater Harvesting
- Other - Assessment Fee Waiver
- Other - Expedited Permitting
- Owner - EE Tax Credit (45L) and Infill Infrastructure/Brownfield Grant

### Captured Incentives

- Developer installed EE, R & WC equipment eligible for a \$7M rebate over five years.
- Developer received \$100,000 in cost avoidance for assessment fees through the City.
- Developer remediated the brown-field site to be eligible for \$1.5M in tax exemptions and grants.

(\*EE - energy efficiency)  
(\*\*WC - water conservation)  
(\*\*\*R - renewables)

Cost-Savings From Incentives: **\$8.5M**  
(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$11,000\***

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **5 years**

*\*based on the volume of 2,200 homes, \$5 per home*



# Manufacturing (Ground Up)

## Colorado

**T**his 100,000 square foot manufacturing company built their first facility and engaged Incentifind worked to assess all incentives available as well as how to maximize the incentives across the construction schedule. Incentifind performed a whole building approach, looking at all energy efficiency (indoor and outdoor), water conservation (indoor and outdoor), and as well as finance and economic incentives.

Lastly, the owner leveraged Incentifind's APPLY Services to manage applying and capturing all incentives.

### Eligible Incentives

- EE\* - (Kitchen Equipment Program)
- EE\* - (Water Heating Program)
- EE\* - (Controls Program)
- EE\* - (LED Lighting Program)
- EE\* - (Natural Gas Custom Program)
- WC\*\* - (Water Project Loan Program)
- R\*\*\* - (Renewable Sales Tax Refund)
- Other - Job Creation Loan Program
- Owner - (EE (179D) and Electric Vehicle Tax Credit Incentives)

### Captured Incentives

- Building Owner installed EE equipment eligible for a \$45,000 rebate.
- Building Owner installed Solar PV equipment eligible for \$8,000 in cost avoidance.
- Building Owner installed EV Charging & Solar equipment eligible \$38,000 in tax credits.

(\*EE - energy efficiency)  
(\*\*WC - water conservation)  
(\*\*\*R - renewables)

Cost-Savings From Incentives: **\$91K**  
(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **18 months**

# Existing Hotel

## Baltimore, Maryland

This 250,000 squarefoot existing hotel is 21 years old and had not seen upgrades to its building systems. Due to COVID-19, low occupancy allowed the owner to make necessary upgrades to the property. IncentiFind worked with the owner/operator to assess all incentives available as well as how to maximize the incentives across the construction schedule.

Lastly, the owner/ operator leveraged IncentiFind's APPLY Services to manage applying and capturing all incentives.

### Eligible Incentives

- EE\* - (HVAC Program)
- EE\* - (VFD Program)
- EE\* - (Lighting & Controls Program)
- EE\* - (Custom Program)
- EE\* - (Food Service Equipment Program)
- EE\* - (Refrigeration Program)
- R\*\* - (Solar Clean Energy Program)
- Owner – (EE (179D) and R (ITC) Tax Credit Incentives)

### Captured Incentives

- Building Owner installed EE equipment eligible for a \$105,000 rebate.
- Building Owner installed Solar equipment eligible for a \$10,000 rebate.
- Building Owner installed Solar PV equipment eligible \$15,000 in tax credits.

\*EE – Energy Efficiency  
 \*\*R – Renewables

Cost-Savings From Incentives: **\$130K**  
 (Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **24 months**



# Ground Up Hotel

## Kansas City, Missouri

**T**his 300,000 square foot hotel project is a ground-up development in the downtown area in Kansas City. The developer engaged IncentiFind to identify all cost-saving incentives available for the project by approaching this new construction project holistically.

IncentiFind used the construction schedule – spread over two incentive program years – to “double-dip” and capture additional funds from incentive programs.

### Eligible Incentives

EE\* – (Custom Program; HVAC/ Chiller/ LEDs/ Controls/ Envelope & Appliances)

EE\*\* - (Natural Gas Water Heating Program)

Developer – (EE (179D) and Electric Vehicles Tax Credit Incentives)

### Captured Incentives

Developer installed EE equipment (electric + natural gas) eligible for a \$180,000 rebate.

Developer installed Electric Vehicle Charging Infrastructure eligible for \$30,000 in tax credits.

Installers eligible for \$12,000 in sales tax savings / cost-avoidance.

\*EE - Energy Efficiency

Cost-Savings From Incentives: **\$222K**  
(Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (Contingency Fee)

Project Timeframe: **18 months**

# Multi-Building Development

Confidential, Texas

**T**his 855,000 square foot mixed-use lifestyle center is a multi-building development that comprises of 300,000 square of retail, 90,000 square-feet of class A office space, over 200 units of multi-family leases, a 200 key hotel, and 10,000 square-feet of conference space. IncentiFind worked with the developer to assess all incentives for each asset type as well as how to maximize the incentives across the construction schedule.

The developer engaged directly with IncentiFind to identify all utility and tax incentives. The developer also requested that IncentiFind include tenant-focused incentives to help the developer attract anchor tenants.

Lastly, the developer leveraged IncentiFind's lender network to get connected to Property Assessed Clean Energy (PACE) financing. IncentiFind works with PACE lenders from all over the United States.

## Eligible Incentives

- EE\* - (Developer - Custom for Commercial)
- EE\* - (Developer - Custom for Multi-family)
- EE\* - (Developer - Custom Generators)
- EE\* - (Tenant - Load Management)
- EE\* - (Tenant - Custom for Commercial)
- WC\*\* - (Developer - Property Abatement & Sales Tax Exemption)

## Captured Incentives

- Developer installed EE equipment eligible for a \$375,000 rebate.
- Multifamily installed EE equipment eligible for a \$200,000 rebate.
- Generators eligible for a \$15,000 rebate.
- Tenant Load Management eligible for \$10,000 in bill credits.
- Tenant installed EE equipment eligible for a \$90,000 rebate.
- Developer installed WC equipment eligible \$45,000 in tax incentives.

\*EE - Energy Efficiency  
 \*\*WC - water conservation

Cost-Savings From Incentives: **\$680K**  
 (Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **24 months**



# Multifamily Ivy Energy

## San Diego, California

**T**his 50,000 square foot Multi-Family project is a ground-up development in the San Diego area. The property has 46 units in total across 10 complexes, 4 of which had an affordable housing component, and the developer was keen to include solar onsite to meet the Title 24 requirement for new housing.

The developer engaged IncentiFind to identify all cost-saving incentives available for the project by approaching this new construction site with all electric and as much “clean energy” as possible (energy efficient HVAC systems, LED lighting, Solar, and indoor/ outdoor water conservation).

While IncentiFind worked with the Utility to capture cash reimbursements, we connected the customer with Ivy Energy to maximize their savings on their mandatory solar investment. For every kWh solar produced, the margin between tenant’s pre-solar utility rates and the levelized cost of solar can be captured by the owner thus closing the gap on the incurred installation & operating cost among multi-unit facilities.

### Eligible Incentives

EE\* – HVAC/  
LEDs/ Thermostat  
Controls/ Envelope &  
Appliances

WC\*\* - Irrigation &  
Sprinkler Controls/  
Plumbing Fixtures/  
Aerators

### Captured Incentives

All EE & WC equipment  
eligible for a \$90,000 rebate.

Ivy Energy’s Software  
eligible for \$25,000 bill  
credit reimbursement.

\*EE – Energy Efficiency  
\*\*WC – water conservation

Cost-Savings From Incentives: **\$115K**  
(Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **18 months**

# Commercial Office

## New York City, New York

**T**his 100,000 square foot Commercial Office project is an existing building retrofit by a large corporation. The project includes several floors of an office that required an LED lighting upgrade without disrupting business. The owner is the main tenant in the Class AA building.

The lighting installer engaged IncentiFind to identify all cost-saving incentives available for LED lighting (full fixture change-out). The owner also desired to have IncentiFind identify Energy System Control incentives however, due to COVID-19 this portion of the project will be revisited after New York reopens.

The owner opted for IncentiFind's application fulfillment services to capture funding from the LED lighting incentives.

### Eligible Incentives

EE\* - LED Lighting

EE\* - Controls

### Captured Incentives

LED equipment was eligible for a \$500K rebate

Controls equipment will be revisited later

\*EE - Energy Efficiency

Cost-Savings From Incentives: **\$500K**  
(Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **6 months**



# Municipality

## Undisclosed, Texas

**T**his 50,000 square foot City Hall project is a New Construction building in the Texas area. The facility included a kitchen and break rooms amongst two stories of office.

The construction management firm engaged IncentiFind to identify all cost-saving incentives available for the City by approaching this new construction site holistically. That meant looking at energy efficient HVAC systems, LED lighting, Solar, and indoor/ outdoor water conservation. While there was an initial desire to include solar, as the design developed and it was decided against Solar due to budgetary reasons.

The City opted for IncentiFind's application fulfillment services to capture funding from the New Construction Custom Building program which included rebates for VFDs, HVAC units and controls, LEDs, Windows, and Food Service equipment. IncentiFind's APPLY Services were also used to secure rebates for indoor plumbing equipment and outdoor water saving landscape measures.

### Eligible Incentives

EE\* - Custom – HVAC/  
LED/Controls/VFDs/  
Windows/Appliances

WC\*\* - Plumbing  
Fixtures, Outdoor  
Sprinkler sensors &  
native landscaping

### Captured Incentives

All "Custom" saving  
measures for EE equipment  
was eligible for \$90,000

All "Custom" saving measures  
for WC equipment was  
eligible for \$20,000

\*EE – Energy Efficiency  
\*\*WC – Water Conservation

Cost-Savings From Incentives: **\$110K**  
(Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **20 months**  
(design>completion)

# Senior Housing

## Monmouth County, New Jersey

**T**his 200,000 square foot Senior Housing project is a new construction project by a private developer. The project includes 160 units of assisted living with common spaces, and set LEED Silver as a goal, though the project would not go on to register as a LEED certified project.

The owner's representative engaged IncentiFind to identify all cost-saving incentives available for lighting (indoor and outdoor), HVAC systems, and water conservation (indoor and outdoor). The owner also engaged IncentiFind's subject matter expert for all tax incentives associated with Senior Housing projects. Lastly, the owner opted for IncentiFind's application fulfillment services to capture funding from incentives.

### Eligible Incentives

**EE\* - Whole Building**

**WC\*\* - Indoor Tax Incentives**

### Captured Incentives

All energy efficient equipment was eligible for a \$1MM rebate

Energy efficient tax credit of up to \$2000/ unit

Indoor fixtures were applied to this \$10,000 grant program

\*EE - Energy Efficiency  
\*\*WC - Water Conservation

Cost-Savings From Incentives: **\$1,010,000**  
(Cash Reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **18 months**

# House of Worship

Orange County, California

This 100,000 of existing House of Worship is being upgraded by its owner with a focus on energy efficiency improvements (lighting, HVAC, controls) as well as food service area. Reducing monthly electric bills was of high priority to the owner in order to be a better steward of donations.

The installer engaged IncentiFind to identify all cost-saving incentives available to the owner as well as application fulfillment to capture funding from the incentives. This owner was tax-exempt therefore, no tax incentives were considered.

## Eligible Incentives

EE\* Indoor

## Captured Incentives

LED (interior) lighting rebates totaled \$50,000

HVAC and BAS rebates totaled \$35,000

Food Service rebates totaled \$15,000

\*EE – Energy Efficiency

Cost-Savings From Incentives: **\$95K**  
(Cash 1 reimbursement)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **6 months**



# Higher Ed

## Houston, Texas

**T**his 13 building campus is publicly owned by a community college. The property is over 20 years old and had not received an upgrade to MEP systems on 10 of its 13 buildings. Two buildings underwent complete gutting and rebuild for full functional changes.

The owner's representative engaged IncentiFind to identify all cost-saving incentives available for lighting (indoor and outdoor), HVAC systems, and water conservation (indoor and outdoor). The owner decided that due to the fast-moving nature of the project, that only Year 1 cash reimbursements would be considered. The owner opted for IncentiFind's application fulfillment services to capture funding from the incentive.

### Eligible Incentives

EE\* - Lighting

EE\* - HVAC

WC\*\* - Solar

### Captured Incentives

LED upgrade of all lighting totaling \$37K in incentives

While incentives were identified, the owner decided not to move forward

While incentives were identified, the owner decided not to move forward

\*EE - Energy Efficiency  
\*\*WC - Water Conservation

Project Cost: **CONFIDENTIAL**

Cost-Savings From Incentives: **\$37K**  
(Year 1 reimbursement)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **6 months**

# Commercial Warehouse

San Joaquin County, California

This 100,000 sf existing warehouse is being upgraded by its owner with a focus on all energy efficiency improvements (such as lighting, HVAC and refrigeration) as well as co-generational system. This warehouse is conditioned at a low setting due the function (storage) of the building. Reducing monthly electric bills was of high priority to the owner.

The installer engaged IncentiFind to identify all cost-saving incentives available to the owner as well as application fulfillment to capture funding from the incentives.

## Eligible Incentives

EE\* All systems

EE\* Co-Gen

EE\* Refrigeration

## Captured Incentives

LED (exterior & interior) totaled \$50K, HVAC (new units & optimization) totaled \$100K

Co-Generational system (newly installed) totaled \$50K

Refrigeration upgrades totaled \$15K

\*EE – Energy Efficiency

Project Cost: **CONFIDENTIAL**

Cost-Savings From Incentives: **\$215K**  
(Year 1 reimbursements)

VERIFY Report Fee: **\$500**

APPLY Services Fee: **25%** (contingency)

Project Timeframe: **8 months**