



139 E. BROADWAY AVENUE  
WESTERVILLE, OH 43081  
t. (614) 901-6700  
BUSINESSWISE@WESTERVILLE.ORG

**SELF-DIRECT PROJECT APPLICATION FORM  
REQUIRED FOR SMALL AND LARGE BUSINESSES**

DATE \_\_\_\_\_ ACCOUNT # \_\_\_\_\_  
LEGAL COMPANY \_\_\_\_\_  
DBA \_\_\_\_\_  
INSTALLATION ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

**APPLICANT/PROJECT CONTACT**

COMPANY NAME \_\_\_\_\_ CONTACT \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

**PROPERTY OWNER**  SAME AS APPLICANT

NAME \_\_\_\_\_ CONTACT \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

**TENANT/OCCUPANT**  SAME AS APPLICANT

BUSINESS NAME \_\_\_\_\_ CONTACT \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

**CONTRACTOR**  SAME AS APPLICANT

BUSINESS NAME \_\_\_\_\_ CONTACT \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

**PAYMENT REMITTANCE** (NOTE: PAYMENTS WILL BE MADE TO LEGAL COMPANY NAME)

ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_



139 E. BROADWAY AVENUE  
WESTERVILLE, OH 43081  
t. (614) 901-6700  
BUSINESSWISE@WESTERVILLE.ORG

**SELF-DIRECT PROJECT APPLICATION**

**BUILDING INFORMATION**

DESCRIPTIVE NARRATIVE OF ENERGY PROJECT IMPLEMENTED. INCLUDE DETAILS RELATED TO EXISTING AND INSTALLED SYSTEM(S). FOR LIGHTING PROJECTS, PLEASE JUSTIFY WHICH REBATE TIER YOUR PROJECT SHALL BE CLASSIFIED UNDER. REFER TO SECTION 1.10.1 OF THE TERMS AND CONDITIONS FOR MORE INFORMATION.

PROVIDE A DESCRIPTION OF PREVIOUS EQUIPMENT OPERATING SEQUENCES, SET POINTS, OPERATING SCHEDULES, BALANCING REQUIREMENTS (SUCH AS FLOW, VELOCITY, HEAD, SUCTION, ETC.) OR ANY OTHER OPERATING PARAMETERS REQUIRED TO OBTAIN ESTIMATED ENERGY SAVINGS. INCLUDE DESCRIPTION OF LOADS SERVED AND OPERATING HOURS.

PROVIDE A DESCRIPTION OF NEW EQUIPMENT OPERATING SEQUENCES, SET POINTS, OPERATING SCHEDULES, BALANCING REQUIREMENTS (SUCH AS FLOW, VELOCITY, HEAD, SUCTION, ETC.) OR ANY OTHER OPERATING PARAMETERS REQUIRED TO OBTAIN ESTIMATED ENERGY SAVINGS.

PROVIDE A DESCRIPTION OF ANY OPERATING SEQUENCES, EQUIPMENT MAINTENANCE AND OPERATION PRACTICES THAT ARE VITAL FOR THE SYSTEM TO MAINTAIN ENERGY EFFICIENT OPERATIONS.



139 E. BROADWAY AVENUE  
WESTERVILLE, OH 43081  
t. (614) 901-6700  
BUSINESSWISE@WESTERVILLE.ORG

**ELECTRIC DIVISION**  
**BUSINESSWISE**

**SELF-DIRECT PROJECT APPLICATION**

**REQUIRED DOCUMENTS**

- Completed self-direct application form.
- Final invoices or receipts for the completed project.
- List of old equipment or materials that were replaced in the project. Include manufacturer, model, HP or kW ratings, efficiency rating, etc. (provide technical product literature or specification sheets, if available).
- List of new equipment or materials used in implementing the project. Include manufacturer, model, HP or kW ratings, efficiency rating, etc.
- Specification sheets and submittals of all newly installed equipment.
- Energy savings calculations. Include all assumptions, calculation methodology, engineering tools, resources and equations used to determine savings (see Section 1.13 of the program's Terms and Conditions for requirements). Contact the City of Westerville with requests for assistance with energy savings calculations.
- Invoices or receipts for decommissioning or disposal of old equipment.
- W-9 signed by the property owner (not contractor).
- Relevant project drawings for new construction projects (if applicable).

I certify that the statements made in this application are correct to the best of my knowledge and I have read and agree to the program Terms and Conditions. Electronic signatures are acceptable.

\_\_\_\_\_  
SIGNATURE OF APPLICANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PRINTED

COMPLETED APPLICATIONS AND DOCUMENTATION SHOULD BE SUBMITTED ELECTRONICALLY TO:

TARA TRIGG, BUSINESS MANAGER  
CITY OF WESTERVILLE - ELECTRIC DIVISION  
BUSINESSWISE@WESTERVILLE.ORG

IF YOU HAVE ANY QUESTIONS RELATED TO THE BUSINESSWISE PROGRAM, PLEASE CALL THE WESTERVILLE ELECTRIC DIVISION AT (614)901-6700, VISIT WWW.WESTERVILLE.ORG/BUSINESSWISE OR EMAIL BUSINESSWISE@WESTERVILLE.ORG. APPLICATIONS WILL RECEIVE NOTIFICATION OF RECEIPT WITHIN TWO WEEKS; FINAL PROJECT AUDITS WILL BE SCHEDULED WITHIN 30 DAYS.