

# Building Operator Certification Tuition Assistance Application



Part of the

**PNM Building Tune-up Program**



## **PNM Business Energy Efficiency Team**

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Albuquerque, NM 87102  
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## **How to Participate**

- ☐ Review program eligibility
- ☐ Review and sign Customer Agreement
- ☐ Submit Pre-application
- ☐ Complete Level 1 Building Operator Certification coursework
- ☐ Submit Final application with copy of Certification within 90 days of completion
- ☐ Tuition reimbursement will be sent within 4-6 weeks of receiving Final application



# Application Checklist

## 1 Verify

- ☐ Submit final application within 90 days of course completion and include the following components:

## 2 Applicant Information Form

### Student Information

- ☐ Student name and contact information
- ☐ Managed facility as it appears on PNM bills
- ☐ Managed facility representative name, title and contact information
- ☐ Managed facility physical information
- ☐ PNM account number for managed facility is complete and accurate
- ☐ Taxpayer ID for managed account is complete and accurate; first-time customers submit [W-9](#)

### Reimbursement Check Information

- ☐ Indicate whether the managed facility or the student should receive the check. If the student is to receive the check:
  - ☐ Student's SSN is included
  - ☐ Managed facility representative and student have signed box indicating payment to student

## 3 Terms & Conditions of Application

- ☐ Managed facility representative and student have read and agree with the terms and conditions of the Building Tune-up program

## 4 Agreement Form

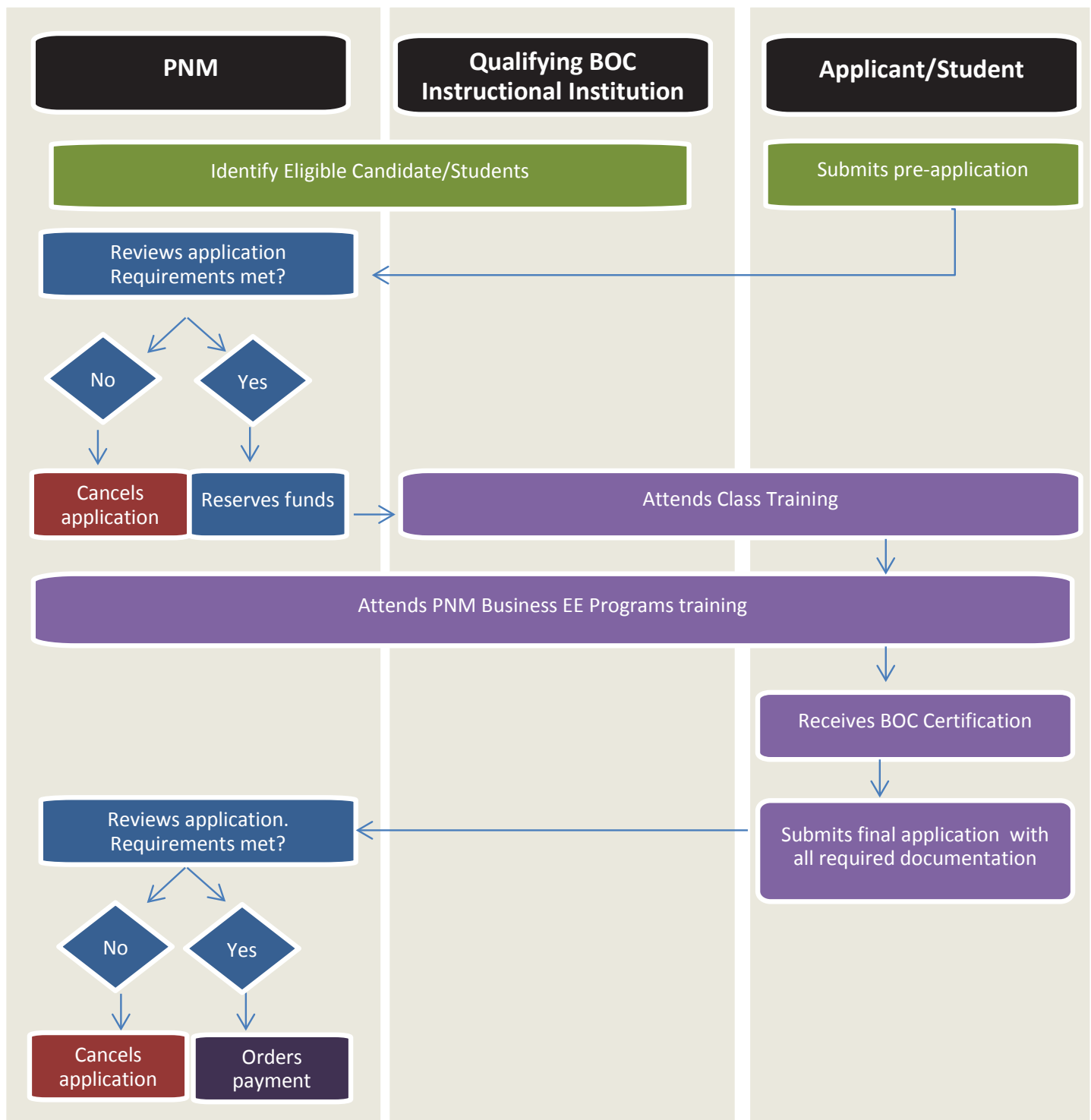
- ☐ If managed facility agrees to release the check to the student, both the managed facility representative and the student have signed and dated the Agreement Form
- ☐ The managed facility representative has signed, dated, and filled in all sections of the Agreement Form, including:
  - BOC course completion date
  - Total tuition cost
  - Total tuition reimbursement requested

## 5 Additional Documentation

Include the following documentation with the application:

- ☐ A copy of the certification, indicating course completion
- ☐ A copy of the attendance record indicating completion of PNM Business Energy Efficiency training
- ☐ Tuition receipt from qualified BOC instruction facility that is dated no more than 90 days prior to BOC Tuition Reimbursement application date
- ☐ The managed facility or student's name is indicated on the tuition receipt
- ☐ Invoice indicating that it has been paid by the applicant

# Sequence of Event



# Applicant Information

## Office Use Only - BOC

Application #

Revision #

☐ Pre-Notification Date \_\_\_\_\_

or

☐ Final Application Date \_\_\_\_\_

## Account Information

PNM Account Number (Main Facility)           +

Name of Customer as it appears on PNM utility bill \_\_\_\_\_

Facility Service Address as it appears on PNM utility bill \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Facility Contact

Name \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## Student Information

Name of BOC Student \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## Building Information

Building Type (select one) \_\_\_\_\_

Applicant/Student manages a ☐ Single building ☐ Multiple buildings

If multiple premises, please use [multiple premise worksheet](#)

## Total Square Footage

Conditioned space \_\_\_\_\_ Unconditioned space \_\_\_\_\_

Describe Exterior space with connected load (parking lot, lit walkways, etc.)

\_\_\_\_\_  
\_\_\_\_\_

# Applicant Information

## Typical Occupancy

\_\_\_\_\_ persons or \_\_\_\_\_%

## Cooling Type (check all that apply)

a) Air Conditioning      b) Chilled Water      c) Heat Pump      d) Other

Please describe \_\_\_\_\_

## Heating Type (check all that apply)

a) Boiler      b) Forced Air      c) Other

Please describe \_\_\_\_\_

## Distribution System (check all that apply)

a) Ducted      b) Constant Volume      c) Variable Air Volume      d) Other

Please describe \_\_\_\_\_

## Typical Operational Schedule

### Monday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Tuesday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Wednesday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Thursday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Friday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Saturday

from \_\_\_\_\_am to \_\_\_\_\_pm

### Sunday

from \_\_\_\_\_am to \_\_\_\_\_pm

# Payment Information

## Payment Release

☐ Check here if payment should be sent to the facility, and the facility address and mailing address are the same.

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Taxpayer ID (SSN/FEIN) \_\_\_\_\_ Tax Status Individual

☐ Check here if payment should be sent to the BOC student.

Student Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Taxpayer ID (SSN/FEIN) \_\_\_\_\_ Tax Status \_\_\_\_\_

## Total Utility Incentive

Total Tuition	Total Reimbursement Requested*	Estimated BOC Training Completion Date
_____	_____	_____

\*Total Reimbursement Requested is capped at 100% of the Total Tuition.



# Multiple Premise Worksheet

Multiple Building Locations					
Account #	Premise #	Building Description	Usage Type	Service Address	Square Footage
Total Square Footage					



# Agreement Form

## 1. GENERAL AGREEMENT

As an authorized representative of

\_\_\_\_\_ (“Customer”), a PNM customer eligible for participation in the PNM Building Operator Certification (“BOC”) Tuition Reimbursement Program (the “Program”), I certify that the BOC course in which Customer’s employee \_\_\_\_\_ (the “Applicant”) has or will be enrolled is a course that has been approved by the New Mexico licensed BOC program and commenced or commences on or after June 1, 2014. I have attached documentation including the applicable invoice establishing proof of payment for the Applicant’s BOC course, which was provided by the administrator of the local New Mexico licensed BOC program (the “Administrator”), along with documentation verifying Applicant’s attendance and a completed BOC application form for that employee Applicant. In the event that Applicant has not yet attended the BOC course, I certify that I will submit these required supporting documents and completed BOC application form within 30 days after the date of completion of the course. I further certify that the tuition costs identified in this agreement and the supporting documents are correct and represent the actual costs paid by Customer to the Administrator for Applicant’s attendance of the BOC course. I am aware that there may be additional documentation requirements, which can be found in the Policy and Procedures Manual located on the program website PNM.com/bizrebates or can be ordered by calling 877-607-0741.

## 2. PRE APPROVAL

In order for Applicant to be eligible for the Program, the Applicant must have submitted a pre-application form and have been approved by PNM for the Program prior to BOC course commencement.

## 3. CUSTOMER ELIGIBILITY

I understand that in order for the Customer to qualify for the Program, the meter for which Customer desires to obtain energy savings, as a result of participation in the Program, must be on one of the Program eligible rate schedules, as set forth below:

PNM Tariffs:

- 2A, 2B, 3B, 3C, 4B, 5B, 11B
- Large Service for Public Universities 15B

- Large Service for Manufacturing 17B
- Special Contract Service for Large Customers 23
- Large Service for Manufacturing- Distribution Level 30B

Furthermore, I certify that the Applicant is a building operator or engineer employed by Customer who:

a. Operates an eligible building type within the PNM service territory. Eligible building types include:

- Municipal, K-12 School, College and University
- Large Industrial
- Hospital

b. Has at least two (2) years of experience in building operations & management;

c. Is not currently credentialed as a BOC trainee;

d. Operates building facilities where combined square footage is at least 50,000 ft<sup>2</sup>;

e. Shows proof of class completion by obtaining the course certification;

f. Will attend the PNM program overview session, conducted during the BOC training course, in order to become familiar with all PNM Business Energy Efficiency program offerings; and

g. Commits to working in partnership with the PNM Business Energy Efficiency team on energy efficiency projects within the facility managed or operated by Applicant.

## 4. REGISTRATION AND COMPLETION

I understand that in addition to and separate from entering into this agreement, I must register Applicant for the Program with the local New Mexico licensed BOC course Administrator. Furthermore, I agree to follow, and agree to ensure that Applicant follows all BOC course requirements as put forth by the Administrator.

I understand that the Program eligible BOC course must be completed in coordination with the Administrator within six (6) months of the date on which Applicant is pre-approved by PNM. Customer may only submit one application per employee

<sup>1</sup>Customer will be required to execute a separate agreement for each of Customer’s employee Applicants.



## Agreement Form (cont.)

applicant, but may submit multiple applications for different employee applicants if Customer wishes to have more than one employee participate in the Program. I agree to submit invoice and course completion documentation to the the PNM Business Energy Efficiency team at [energyefficiency@PNM.com](mailto:energyefficiency@PNM.com) or 320 Gold Avenue SW, Suite 500, Albuquerque, NM 87102 within 30 days of course completion. I understand that if I fail to submit timely documentation, incentive payment may be denied.

### 5. TRAINING COURSE COSTS

I understand that I am responsible to pay the Administrator in full for all costs associated with the BOC course. I agree to provide copies of all invoices or other reasonable documentation that verify the costs of Applicant's attendance and completion of the training course.

### 6. INCENTIVE AMOUNTS AND SCHEDULE

Incentive payment will be subject to the following limitations:

- a. The maximum incentive per application is \$1,800 up to 100% of tuition costs, whichever is less.
- b. Tuition as defined by this agreement does not include costs incurred by the Applicant or Customer for books, materials, travel or any other indirect expenses related to enrollment of Applicant in and/or attendance by Applicant of the BOC course.
- c. PNM reserves the right to deny any incentive application that may result in PNM exceeding its Program budget.
- d. Incentives under the Program are offered on a first-come, first served basis and are subject to Applicant eligibility, Customer eligibility and availability of funds.

PNM intends to pay Customer the Program incentive within four (4) to six (6) weeks after PNM's receipt of all required documents, including this agreement, signed by an authorized representative of Customer, and all required supporting documentation.

7. I understand that any and all environmental credits generated by the Program described herein will be retained by PNM.

8. I certify that the information herein is true and correct, and that the Taxpayer ID Number specified herein is the Customer's. I understand that incentive payments assume related energy benefits over a period of 5 years.

9. Customer understands that it may be recognized as a Program participant in PNM promotional materials; Customer agrees that if Customer desires to opt-out of any such recognition, Customer will do so in writing by submitting a letter to the Program office.

10. I understand that the Program is subject to change or cancellation at any time and without notice. PNM is not responsible for any lost, late, stolen, ineligible, illegible, misdirected or postage-due mail. I understand that all completed submissions become the property of PNM and will not be returned, and that PNM makes no guarantees about the availability of products or rebate forms. By participating in the PNM Program, I agree to waive any claims and release PNM and its third party program administrator, DNV Energy Services USA, Inc., from any liability for damages of any kind. I understand that incentive payments are funded through a charge on PNM electric customer bills.

11. I understand that by participating in the Program, I hereby hold harmless PNM and DNV Energy Services USA, Inc. and release them from any and all claims, demands, injuries and damages that I, or a third party, may incur or sustain as a result of my participation in the Program. PNM and DNV Energy Services USA, Inc. shall have no liability whatsoever for any and all actual or alleged claims, demands, injuries or injuries, including third party claims, arising from or in any way related to Customer or Applicant's participation in the Program.

I have read and understand the Program requirements and terms and conditions set forth in this agreement and agree to abide by those requirements. Furthermore, I understand and agree that Customer and Applicant must both meet all eligibility criteria in order for an incentive to be paid to Customer under this Program.

# Agreement Form

**Building Operator Certificate Reference:  
Facility Payment Signature Required**

I understand that in the event funds are reserved based on a pre-notification, the payment of incentives will be based upon the Final Application and program terms and conditions, and that the Program is subject to change or cancellation at any time and without notice. PNM is not responsible for any lost, late, stolen, ineligible, illegible, misdirected or postage-due mail. I understand that all completed submissions become the property of PNM and will not be returned, and that PNM makes no guarantees about the availability of products or rebate forms. By participating in the PNM Program, I agree to waive any claims and release PNM and its third party program administrator from any liability for damages, of any kind. I understand that rebates are funded by a charge on PNM electric customer bills.

**I have read and understand the Program requirements and measure specifications and terms and conditions set forth in this application and agree to abide by those requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program. (Initial here) \_\_\_\_\_**

**As an eligible customer, I verify that the signature below is my own and that the information is correct. I am requesting consideration for participation under this program. (Initial here) \_\_\_\_\_**

**Customer Signature (PNM Customer)**  
Sign by hand

\_\_\_\_\_

**Print Customer Name**

\_\_\_\_\_

**Date** \_\_\_\_\_

**Third Party Signature**  
Sign by hand

\_\_\_\_\_

**Print Third Party Name**

\_\_\_\_\_

**Date** \_\_\_\_\_

## To Submit Application

**OPTION 1:** Email completed application. Print Agreement Form, sign and submit via email or fax.

**Email Application**

**AND**

**Print Agreement  
Form**

**OPTION 2:** Print completed application, sign and email, fax or mail to PNM Business Energy Efficiency Program team.

**Print Entire  
Application**

**PNM Business Energy Efficiency Team**  
energyefficiency@pnm.com  
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