



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

City Use Only 2/11/14	
Date Rec'd:	
By:	

Application Deadline: December 5, 2014

Company Information	
Company Name: _____	Phone: (____) ____ - _____
Contact Person: _____	Fax: (____) ____ - _____
Title: _____	E-mail: _____
Address: _____	Web site: _____

Parent Company Information (if different from Company Information)	
Company Name: _____	Phone: (____) ____ - _____
Contact Person: _____	Fax: (____) ____ - _____
Title: _____	E-mail: _____
Address: _____	Web site: _____

General Company Information	
Type of Industry: _____	Current Number of Employees:
_____	At Boulder facilities: _____
_____	Total: _____
City of Boulder Business License No.: _____	

Estimated Taxes and Fees Paid to the City of Boulder 2014-2016		
Type of Tax or Fee: (e.g. building permit fee, construction use tax, use tax on capital expenditures)	Estimated Amount:	Date Paid or Expected:
(1) _____	(1) _____	(1) _____
(2) _____	(2) _____	(2) _____
(3) _____	(3) _____	(3) _____
(4) _____	(4) _____	(4) _____



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Total Number of Employees at Boulder Facilities	Number of Employees Living in Boulder
2014: Full time: _____ Part time: _____ 2015 (projected): Full time: _____ Part time: _____ 2016 (projected): Full time: _____ Part time: _____	2014: Full time: _____ Part time: _____ 2015 (projected): Full time: _____ Part time: _____ 2016 (projected): Full time: _____ Part time: _____

Capital Expenditures Value of fixed assets purchased in years shown for Boulder facilities (computers, office furniture, equipment)	Facility Improvements Value of new construction, expansion, or remodeling of company's Boulder facilities
2014: _____ 2015 (projected): _____ 2016 (projected): _____	2014: _____ 2015 (projected): _____ 2016 (projected): _____

Local Sales Value of retail sales by company within City of Boulder (including business to business sales)	Average Compensation (Full Time Employees)
2014: _____ 2015 (projected): _____ 2016 (projected): _____	2014: _____ 2015 (projected): _____ 2016 (projected): _____

Average Compensation (Part Time Employees)
2014: _____ 2015 (projected): _____ 2016 (projected): _____



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Requirements and Guidelines

Please complete the attached checklist for general eligibility requirements and community sustainability guidelines. The checklist includes areas for the company to provide written statements addressing compliance with each selected guideline. Please be as specific as possible and attach additional pages (e.g. a cover letter or addendum) as necessary.

CERTIFICATION

(This certification must be completed by a company representative)

I certify that the information and exhibits herewith submitted are true and correct to the best of my knowledge. I understand that city staff may request additional information to complete the application process and that all application materials are public record and subject to public inspection. By signing I also give permission to the city of Boulder to use this company's name and any rebate granted to illustrate the success of this incentive program.

- Name: _____ Title: _____
- Signature: _____ Date: _____

OFFICIAL USE ONLY

Date Received: _____

Referral to Sales Tax: _____

Information Requested: _____

Decision Letter Sent: _____

Rebate Dispersed: _____



CITY OF BOULDER FLEXIBLE REBATE PROGRAM BUSINESS INCENTIVE PROGRAM 2014

To maximize the positive economic, social and environmental impacts of the city of Boulder's 2014 business incentive program, certain requirements and guidelines have been established.

GENERAL ELIGIBILITY REQUIREMENTS

In order to be eligible for the 2014 business incentive program, the company must comply with certain general eligibility requirements. **By submitting this application, you are confirming the company agrees to comply with each one:**

- Be a **licensed business entity** operating within the city limits of **Boulder, Colorado**;
- Verify the company's status as a "**primary employer.**" (The city's flexible rebate ordinance defines a "primary employer" as a business entity consisting of any number of employees which generates **greater than 50% percent of revenues from outside of Boulder County**);
- Be **current on all fees and taxes** owed to the city of Boulder;
- Have paid taxes and/or fees that are eligible for a flexible rebate to the city of Boulder in 2014 and /or are anticipated to be paid in 2015 and 2016.
- Agrees to make its **internal records available** for audit by the city of Boulder to verify compliance with the above requirements;
- Agrees to **maintain a business presence in Boulder for a minimum of three years from receipt of incentive.** If the business moves out of Boulder within that period, the applicant agrees to reimburse the city for the total amount of the incentive received; and
- Agrees to **comply with the sustainability guidelines selected on this application for a period of three years.** Compliance may be demonstrated with an existing company policy or program or by those to be implemented. If the business fails to meet the sustainability guidelines during this time period, the applicant agrees to reimburse the city for the total amount of the incentive received.
- Agrees to **update the estimates** provided on this application in 2015 for a return on investment evaluation of the 2014 program.

FLEXIBLE REBATE PROGRAM - COMMUNITY SUSTAINABILITY GUIDELINES

Applicants for the Flexible Rebate Program must be able to verify compliance with the following guidelines, as noted below.

- The program's range of guideline options provides flexibility for the various types and sizes of Boulder companies to meet program goals.
- Companies may choose the guidelines that best fit their company, but must identify **at least 3 points** from the social sustainability section and **at least 8 points** from the community/environmental sustainability section. Please check each guideline which applies to the company.
- In the areas provided below, **please include detailed statements addressing how the company meets the selected sustainability guidelines.** Please be as specific as possible.
- Applicants may add additional pages to describe guideline compliance. Additional documentation may be requested.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Social Sustainability

Please select at least 3 of the total 10 possible points from this section and explain in the space provided at the end of the section how the company meets each guideline. Companies must verify compliance with a minimum of three points from the following guidelines. Check the box for the guidelines selected.

1. **Average Wage Requirement (1 point):** The company will pay an average annual wage that is equal to or exceeds the Boulder County average annual wage. The most recent average annual wage reported by the state of Colorado is \$55,848.
2. **Health Insurance (1 point):** The company will offer and pay for at least 50 percent of the cost of health insurance premiums for all full-time employees. This coverage must, at a minimum, include major medical coverage for full-time employees and their dependents.
3. **Diversity Support (1 point):** The company will encourage diversity in the workforce through proactive hiring practices or through diversity training programs. These programs can include certified diversity programs, English as a Second Language (ESL) classes and Spanish classes. *(Note: Being an equal opportunity employer alone does not qualify a company for this guideline.)*
4. **Non-profit Support (1 point):** The company will actively support the arts, cultural, or service non-profit sector in Boulder by:
- a. A commitment to donating \$25 or more per year on average for each full-time employee. For example, a firm with 100 employees (as of the end of the previous year) can document at least \$2,500 donated (or to be donated) to Boulder County based arts, cultural, or service non-profit entities over a 12-month period; **and/or**
 - b. Encouraging volunteerism by granting the equivalent of at least one paid day off per year to each employee who utilizes the time to provide support to a Boulder County based non-profit entity.
5. **Dependent Care (1 point):** The company will offer at least \$50 per month in dependent care assistance to employees who utilize daycare or eldercare for a dependent child or other immediate family member. This may be offered as an option in a flexible benefit cafeteria plan. *(Note: A pre-tax dependent care flexible spending program does not qualify.)*
6. **Housing Assistance (3 points):** The company will offer assistance to employees on the purchase or rental of housing located within the city of Boulder. This assistance must have a minimum value of \$1,000. It may be a cash benefit for down payment towards purchase or rental housing assistance to recruit new employees or retain current employees.
7. **Wellness and Health (2 points):** The company will offer to pay at least 50% of the cost of City of Boulder Parks and Recreation annual passes (for all full time employees). This pass allows employees access to the City's three comprehensive recreation facilities and two outdoor pools to support their health, fitness, and well being. At least three employees must be enrolled during the incentive period, and group discounts may apply when at least five employees are enrolled. For more information, please contact the City of Boulder Parks and Recreation Department at 303-413-7259.

PLEASE COMPLETE: In this section, _____ social sustainability points are selected.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Please describe the company's compliance with each Social Sustainability Guideline selected above:

A large, empty rectangular box with a thin black border, intended for the user to provide a detailed description of the company's compliance with the selected Social Sustainability Guidelines.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Community and Environmental Sustainability

Choose at least 8 points from the 33 total possible points from this section. Companies must identify which of the following guidelines apply and explain in the space provided at the end of each section how the company meets each guideline.

1. ENERGY:

Option 1-A (2 points) – Energy Assessment by Xcel Energy:

The company will request a low cost detailed energy assessment by an energy engineer for its facility through Xcel Energy's On-Site Energy Assessment Program. To schedule an assessment contact Xcel Energy's Business Solutions Center at 1-800-481-4700. Exemption requests for previously completing an Xcel Energy Assessment within two years prior to submittal of this application will be considered. Contact City of Boulder staff at 303-441-3017 for more information.

Option 1-B (1 point) – Partners for a Clean Environment (PACE) Participation:

The company will become a member of PACE by completing the brief participation survey. PACE is a free program that encourages businesses to implement sustainability best practices that can increase efficiencies in business operations. The program includes business sustainability tracking, networking events and business to business idea sharing. Contact PACE at 303-786-PACE (7223) or www.pacepartners.com for more information.

Option 1-C (1 point) – EnergySmart Assessment:

The company will request a free energy efficiency opportunity assessment that will identify potential efforts to reduce energy use and save money. This assessment is conducted by an EnergySmart advisor. EnergySmart is a partnership between the City of Boulder, Boulder County, the City of Longmont, and local utilities and helps homes and businesses to become more energy efficient. Contact EnergySmart at 303-441-1300 or www.EnergySmartYES.com.

Option 1-D (2 or 5 points) – Renewable Energy:

The company will purchase *renewable energy credits* through Green-e certified renewable energy credit (REC) providers (**2 points**). Purchased credits must equal at least 25% of facility energy use. (Visit www.green-e.org for a list of providers.)

OR

The company will *install on-site renewable energy* at their facility (**5 points**). On-site renewable energy may include solar PV for electric generation or solar thermal for water heating. There are numerous incentives and rebates for solar energy. Visit ww.dsire.org for more information.

Option 1-E (3 points) – Commercial Building Energy Rating and Reporting:

For companies that own their buildings or occupy an entire building: The company will rate their building's energy performance using the free ENERGY STAR Portfolio Manager online rating tool. This allows building owners, and tenants if applicable, to better understand how their building uses energy and to compare it to similar buildings nationwide. The energy rating process can be completed independently, with the assistance of EnergySmart advisors, or through a private sector energy consultant. Companies must be willing share the data with the city. For more information, please contact City of Boulder Economic Vitality staff at 303-441-3017.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Please describe the company's compliance with each Energy Guideline selected above (if any):

2. WASTE REDUCTION:

Recycling or Zero Waste Programs (1 or 3 points):

Option 2-A (1 point) – Recycling:

The company will implement an office and/or facility recycling program to collect single-stream recyclable materials, including cardboard. For more information, please contact City of Boulder Economic Vitality staff at 303-441-3017.

OR

Option 2- B (3 points) – Zero Waste:

The company will implement a zero waste program. Zero waste involves establishing both recycling and composting services as well as sustainable purchasing practices. Contact Partners for a Clean Environment (PACE) at 303-786-PACE (7223) or www.pacepartners.com for technical assistance, employee training, and educational signage for the company.

Option 2-C (2 points) – Environmental Purchasing Policy:

The company will implement an environmental purchasing policy that dictates environmental products that should be purchased for business use. An environmental purchasing policy can include measures that require the purchase of 100% recycled paper, ENERGY STAR office equipment and other environmentally preferable products. Contact Partners for a Clean Environment (PACE) at 303-786-PACE (7223) or www.pacepartners.com for assistance, including a sample policy.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Please describe the company's compliance with each Waste Reduction Guideline selected above (if any):

3. CERTIFICATIONS:

Option 3-A (3 points) – Partners for a Clean Environment (PACE) Area of Excellence:

The company will achieve a PACE Area of Excellence certification for its facility. The PACE certification program offers three Areas of Excellence, including energy efficiency, zero waste and water conservation. Contact PACE at 303-786-PACE (7223) or www.pacepartners.com to schedule an informational visit.

Option 3-B (5 points) – U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED):

The company will achieve a LEED Certified rating or better for *its primary facility that is constructed or remodeled by or for the company*. There are LEED ratings for operations and maintenance, new construction, or commercial interiors. Contact the U.S. Green Building Council at www.usgbc.org or 800-795-1747 for more information.

Please describe the company's compliance with each Certifications Guideline selected above (if any):



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

4. TRANSPORTATION:

Commute Trip Reduction Program (1 point or 2 points):

Option 4-A (1 point) – Commute Trip Reduction Program without Financial Incentives:

The company will develop, implement and monitor an employee commute trip reduction (CTR) program with the assistance of the city of Boulder's GO Boulder staff (303-441-3266). The purpose of the CTR program is to reduce vehicle trips by employees to mitigate the impacts on congestion, air quality, and energy. Other benefits for employers include freeing up parking for customers and improving employee recruitment and retention.

A CTR program consists of a combination of transportation demand management strategies and policies that provide additional travel choice opportunities for employees, such as:

- alternative work schedules, such as telecommuting and compressed work week programs
- showers and changing facilities
- secure and covered bicycle parking
- preferential parking for carpools and vanpools
- increased parking costs for drive alone commuters

OR

Option 4-B (2 points) – Commute Trip Reduction Program with Financial Incentives:

With the assistance of GO Boulder city staff, the company will develop a commute trip reduction program composed of a combination of elements listed under Option 4-A with additional financial incentives or pre-tax incentives to employees who use alternative modes of transportation to get to work such as transit, carpool, vanpool, bicycle or walking.

Financial incentives could include implementing a parking cash-out program, paying all or a portion of employees' transit pass costs or subsidies of carpool or vanpool costs. Pre-tax benefits to employees that vanpool or use transit according to IRS Code 132(f), "Qualified Transportation Fringe Benefits" allows employees to pay for certain transit costs with pre-tax dollars. Employers can also take advantage of the Bicycle Commuter Act that provides a financial incentive to employees who bicycle to work. Contact GO Boulder at 303-441-3266 for more information.

Option 4-C (4 points) – EcoPass Participation:

The company enrolls in RTD's Corporate Eco Pass program, appoints an employee transportation coordinator (ETC) to serve as a liaison with the city of Boulder's GO Boulder program, and conducts periodic employee travel behavior surveys. This option is especially encouraged for companies that are within a quarter of a mile of high frequency transit service. Companies must already be enrolled in the EcoPass Program by the application deadline to meet this guideline. Contact GO Boulder at 303-441-3266 for more information.



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

Please describe the company's compliance with each Transportation Guideline selected above (if any):

5. COMMUNITY SUSTAINABILITY

Option 5-A (1 point) - General Business Practices:

The company demonstrates that its mission, products and/or services are directly related to sustainability or shows exceptional leadership in implementing sustainable business practices that further the city's policies and goals related to environmental, social, and economic sustainability. The city seeks to maintain and enhance the livability, health and vitality of Boulder and its current and future natural systems.

Option 5-B (1 point) – Buying In Boulder:

The company commits to purchasing a minimum of 25% of its total goods and services (based on value) from businesses located in the city of Boulder. Goods include items such as office supplies and production materials. Services may include catering, consulting, and employee training.

Please describe the company's compliance with each Community Sustainability Guideline selected above (if any):

PLEASE COMPLETE:
In this section, _____ community and environmental sustainability points are selected.

Total Sustainability Points (for office use only)	Social Sustainability (min. 3 required)	
	Community/Environmental Sustainability (min. 8 required)	



**CITY OF BOULDER
FLEXIBLE REBATE PROGRAM
BUSINESS INCENTIVE PROGRAM
2014**

FLEXIBLE REBATE PROGRAM – PROGRAM INTENT

Applicants for the 2014 Flexible Rebate Program must be able to demonstrate that the company fulfills the intent of the city ordinance which established the program by addressing the statements below.

Please tell us your company’s “story”, including a brief company history, description of proposed construction projects and expansion, equipment investment, and/or relocation plans.

- How will the requested rebate enable your company to support the local economy and contribute to a sustainable community?
- How will the requested rebate benefit your company?
- You may wish to include the following estimated data for 2014, 2015, and 2016:
 - Estimated indirect business spending within the city of Boulder, such as hospitality expenditures and entertainment expenses. This would include hotel accommodations, food/beverage spending, as well as the number of room-nights in Boulder your business expects to generate.
 - Estimated direct employee spending within the city of Boulder (e.g. housing, entertainment, household spending, food and services)

Be as specific as possible and attach additional pages if necessary, as this information will be considered in a return on investment analysis used to help determine the amount of any approved rebate.

Please use this space to answer the questions above:

Flexible rebates are granted at the City Manager’s discretion. Since there is a finite funding source, the City Manager may weigh the value to the community of different applications. The City Manager is not required to spend such funds and may consider such issues as appropriate timing and future economic development opportunities. Nothing contained in this program is intended to create any type of an entitlement or right to a flexible rebate. The City Manager’s decision on flexible rebates is final and there is no appeal from such decision.