

BTM-Optimize Site Screen — Scoping Questionnaire

Site Screen — Intake Questionnaire

Send this to the client 3-5 days before the kickoff call. Fields marked **(required)** must be populated to run the screen; fields marked *(helpful)* sharpen the answer but the screen can proceed without them.

Client: _____ Project: _____ Prepared by: _____

_____ Date: YYYY-MM-DD

1. Site basics

Field	Answer
Site name (required)	
City / county / state (required)	
Latitude / longitude <i>(helpful — drives solar yield, weather sampling)</i>	
Site control status (owned / under contract / LOI / scouting) (required)	
Acreage (gross / usable for power) <i>(helpful)</i>	

2. Load profile

Field	Answer
Target full load (required)	_____ MW
Load type (data center IT / industrial / residential / mixed) (required)	
Phasing (single building or multi-phase ramp) (required)	
First building energization target (required)	YYYY-Q#
Final phase energization target (required)	YYYY-Q#
PUE / heat-rejection assumption <i>(data center only)</i>	
Critical load fraction <i>(uptime-critical %)</i>	
Curtable / flexible load fraction <i>(helpful)</i>	

3. Grid service

Field	Answer
Serving utility (required)	
Tariff schedule (required)	

Field	Answer
Grid service status (no application / queued / studied / agreement signed / energized) (required)	
Currently committed import capacity (required)	_____ MW
Utility's estimated full-service date (required)	YYYY-Q#
Known interconnection upgrades required <i>(helpful)</i>	
Any standby / backup demand charges <i>(helpful)</i>	

4. Behind-the-meter scope (preferences, not commitments)

Field	Answer
Technologies the client will consider (recip / turbine / solar / BESS / fuel cell / dual-fuel) (required)	
Technologies explicitly off the table <i>(helpful)</i>	
Permitting posture (host community supportive / hostile / unknown) (required)	
Air-permit ceiling — NOx, CO2, operating-hour limits <i>(helpful)</i>	
Water availability for cooling <i>(helpful)</i>	

5. Fuel access

Field	Answer
Natural gas pipeline within 1 mile (Y/N + distance) (required for gas options)	
Pipeline operator and pressure class <i>(helpful)</i>	
Fuel-supply contract status (no contract / LOI / firm) <i>(helpful)</i>	
Backup-fuel option (dual-fuel diesel / propane / N) <i>(helpful)</i>	

6. Financial frame

Field	Answer
IRR hurdle (required)	_____ %
Discount rate / cost of capital (required)	_____ %
Capex tolerance band (rough order) (required)	\$_____ M
Tax equity / ITC / PTC eligibility <i>(helpful)</i>	
Stranded-capex tolerance <i>(helpful — drives go/no-go threshold)</i>	

7. Decision context

Field	Answer
What decision will this screen unblock? (required)	

Field**Answer**

Who is in the room when the answer lands (IC, lender, hyperscaler customer, EPC)? **(required)**

What does “no-go” mean in your context (kill, defer, re-scope)? **(required)**

Hard deadline for the answer **(required)**

YYYY-MM-DD

Submission

Return this filled-out questionnaire to **adam@sgridworks.com** at least 24 hours before the kickoff call. We will reach out for any required fields left blank.