# AGENDA

- 2022 Program Year Review
- Program Dates & Budget
- Program Overview
- Requirements & Qualifications
- Inspections & Minimum Equipment Standards
- Contact Information
2022 PROGRAM REVIEW
2022 PROGRAM REVIEW

$6,216,107
INCENTIVES PAID

40
AVERAGE kW

201,424
AVERAGE kWh

333
TOTAL PROJECTS
2023 PROGRAM BUDGET & DATES
2023 Commercial Budget

<table>
<thead>
<tr>
<th>Programs</th>
<th>2023 Incentive Budget *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial SOP</td>
<td>$8,493,760</td>
</tr>
</tbody>
</table>

Approximately $1.2M in 2022 Carry-over Projects in 2023

Incentives are limited to 20% of the program budget (incentive cap) for each Service Provider (in combination with its affiliates). Oncor may raise the incentive cap based on program performance.

*Oncor reserves the right to increase or decrease the actual incentive budget of the program during the program year as needed to achieve Energy Efficiency program objectives.
PROGRAM OVERVIEW & REQUIREMENTS
Program Overview

Commercial Standard Offer Program

The Commercial Standard Offer Program provides incentives to approved participating Service Providers who implement qualifying peak demand and/or energy saving projects for eligible Oncor commercial customers.

- Retrofit Projects require a pre- and post-inspection
- New Construction Projects require a post-inspection

2023 Program Open Dates

Service Provider Application in EEPM: December 23, 2022

Project Application in EEPM: December 23, 2022
How to Enroll as a Service Provider

**Service Provider (SP)**

- SP goes to eepm.oncor.com, completes Umbrella Agreement, and provides W9
- SP completes Program Application and SP Profile in EEPM; Insurance Carrier provides Certificate of Insurance
- SP contacts Help Desk to associate with a program; Completes Program Addendum
- SP submits Project Applications

**Oncor**

- Oncor reviews and executes Umbrella Agreement; SP receives EEPM login
- Oncor reviews and executes Program Addendum if Application is approved

Visit [https://eepm.oncor.com/commercial-provider.aspx](https://eepm.oncor.com/commercial-provider.aspx) for more information and to sign up.
## Insurance

<table>
<thead>
<tr>
<th>TYPE</th>
<th>MINIMUM COVERAGE LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bodily Injury and Property Damage</td>
<td></td>
</tr>
<tr>
<td>Each Occurrence</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>General Aggregate</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Product Comp/Op Aggregate</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Automated</td>
<td>$500,000</td>
</tr>
<tr>
<td>Workers Compensation</td>
<td></td>
</tr>
<tr>
<td>Each Accident</td>
<td>$500,000</td>
</tr>
<tr>
<td>Disease Policy</td>
<td>$500,000</td>
</tr>
<tr>
<td>Disease Employee Limit</td>
<td>$500,000</td>
</tr>
</tbody>
</table>

Quick Tip: See “2023 Insurance Guidelines” for specific requirements.

Insurance Acord should be completed and emailed to eepminsurance@oncor.com by the INSURANCE AGENT. Insurance certificates **cannot** be accepted directly from the Service Provider.

Expired insurance will result in lock-out. All service provider companies must keep insurance current and active.
Program Qualifications

Service Providers and Aggregators include:

- National or local energy service companies
- Retail Electric Providers

All participating customers must be eligible commercial customers served by Oncor.

Due to opt-out provisions, transmission level, for-profit customers are excluded from the Program.

Incentives are not available for commercial customers (only those classified as manufacturing) that have selected to opt-out from paying into the Energy Efficiency Cost Recovery Fund (EECRF).
Program Qualifications

Eligible Customer ESI IDs

- ESI IDs must be served by Oncor.
- Oncor meters contain one of the following company codes. The last seven digits are the premise (account) number or meter number in EEPM.

**NOTE**: Check the premise ID in EEPM to verify the rate code. Customers that have a “Commercial” rate code and contribute to the Energy Efficiency Cost Recovery Fund are eligible.
Project Types

2 Pathways

Deemed Savings

- Commercial Deemed
  - Deemed Savings projects
  - $500 minimum incentive

Measurement & Verification (M&V)

- Custom Option M&V
  - M&V projects
  - Minimum incentive required for certain measures
PROGRAM PROCESS

PROJECT LIFE CYCLE

SAVINGS REPORT
Project sent for payment

POST-INSPECTION
Conducted by Oncor and verifies project information

INSTALLATION NOTICE
Project submitted by SP has been implemented

RESERVATIONS OF FUNDS
Confirms estimated savings and incentive reservation

INITIAL APPLICATION
Block funds for a specified period of time

FINAL APPLICATION
Submitted by SP upon project confirmation

PRE-INSTALLATION INSPECTION
DO NOT start work until completed!

POST-INSPECTION
Conducted by Oncor and verifies project information
Program Evaluation

The Public Utility Commission of Texas uses an outside contractor (EM&V Team) to evaluate all the utility-sponsored energy efficiency programs.

- Responsible for verifying reported savings, estimating free-ridership and calculating program cost-effectiveness.
- You may be contacted by the evaluator to answer a survey.
- Some projects may be selected for an on-site inspection by the evaluator.
Program Information

Program Manuals

• Available on eepm.oncor.com under the Resources/Commercial tab.
• Program Manuals include program processes and procedures.

State of Texas Technical Reference Manual (TRM)

• Available on eepm.oncor.com under the Resources/Commercial tab.
• The Public Utility Commission of Texas (PUCT) uses an outside contractor (EM&V Team) to conduct Evaluation, Measurement and Verification for all utility programs.
• The TRM compiles all PUCT-approved deemed savings and measure requirements into one document for easy reference.
• The TRM is periodically updated. Always refer to the latest version of the TRM.
INCENTIVES
Geographic Adjustments

• An additional 15% payment for all projects, calculated on a site basis, outside the five-county Metroplex area.
  - The Metroplex area includes Dallas, Tarrant, Rockwall, Denton, and Collin counties.

Incentive Example: $10,000 incentive becomes $11,500 outside of the Metroplex.
## Lighting

<table>
<thead>
<tr>
<th>Lighting Type</th>
<th>$/kW NPV</th>
<th>$/kWh NPV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting: Light Emitting Diode (LED) (Screw-in)</td>
<td>$146.58</td>
<td>$0.040</td>
</tr>
<tr>
<td>Lighting: Light Emitting Diode (LED) (Fixture, not screw-in)</td>
<td>$209.21</td>
<td>$0.057</td>
</tr>
<tr>
<td>Lighting: Light Emitting Diode (LED) (Screw-in Corncob)</td>
<td>$209.21</td>
<td>$0.057</td>
</tr>
<tr>
<td>Lighting: Modular CFL and CCFL Fixtures</td>
<td>$217.67</td>
<td>$0.059</td>
</tr>
<tr>
<td>Lighting: T8 and T5 Linear Fluorescent</td>
<td>$213.44</td>
<td>$0.058</td>
</tr>
<tr>
<td>T-LED (Type “C” DLC Approved Only) Paid per fixture (Multiple fixtures with one ballast converting to one driver is considered as one fixture).</td>
<td>Fix amount per fixture</td>
<td>$6.00</td>
</tr>
<tr>
<td>Occupancy Sensor— Lodging Guest Room Occupancy Sensor Controls</td>
<td>$80 per room</td>
<td>*</td>
</tr>
</tbody>
</table>

*T-12 lamps and magnetic ballasts qualify for retrofit using a T-8 lamp and electronic ballast baseline.*

NOTE: LEDs require ENERGY STAR®, Design Lights Consortium (DLC), or other TRM approved methods.
### HVAC

<table>
<thead>
<tr>
<th>HVAC Measure/Control</th>
<th>$/kW NPV</th>
<th>$/kWh NPV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variable Refrigerant Flow System</td>
<td>$294.79</td>
<td>$0.095</td>
</tr>
<tr>
<td>Ground Source Heat Pump (Geothermal)</td>
<td>$294.79</td>
<td>$0.095</td>
</tr>
<tr>
<td>Water Cooled Centrifugal Chiller</td>
<td>$387.81</td>
<td>$0.125</td>
</tr>
<tr>
<td>Water Cooled Screw/Scroll Chiller</td>
<td>$348.13</td>
<td>$0.112</td>
</tr>
<tr>
<td>Air Cooled Centrifugal Chiller</td>
<td>$387.81</td>
<td>$0.125</td>
</tr>
<tr>
<td>Air Cooled Screw/Scroll Chiller</td>
<td>$348.13</td>
<td>$0.112</td>
</tr>
<tr>
<td>Water Cooled DX Unit</td>
<td>$294.79</td>
<td>$0.095</td>
</tr>
<tr>
<td>HVAC Variable Frequency Drives</td>
<td>$285.29</td>
<td>$0.086</td>
</tr>
</tbody>
</table>

Additional measures and incentives can be found at [eepm.oncor.com](http://eepm.oncor.com) under the Resources/Commercial tab.
## ADDITIONAL APPROVED MEASURES

<table>
<thead>
<tr>
<th>Measure Name</th>
<th>Eligibility Criteria</th>
<th>Incentive</th>
</tr>
</thead>
</table>
| High Efficiency Data Center Air Conditioning | • Retrofit and New Construction  
• Building Type: Data Center                                                                                           | $294.79/kW and $.095/kWh                     |
| ENERGY STAR® Commercial Ice Makers         | • Equipment includes air-cooled batch and ice makers for ice-making hear (IMH), self-contained (SCU) and remote condensing (RCU)  
• Not included: water-cooled ice makers, ice makers with ice and water dispensing systems, air-cooled RCU's designed only for connection to remote rack compressors. | Batch ($0.20 per harvest or Continuous ($0.30 per harvest) |
| Demand Controlled Kitchen Ventilation      | • Kitchen ventilation systems with/without dedicated make-up air units.  
• Building types: Casual Dining/fast food, 24-hour restaurant/hotel, school café with/without summer | $400 per unit                                 |
| Vending Machine Controls                   | • Baseline equipment: 120-v single phase refrigerated beverage or non-refrigerated snack vending machine.  
• Manufactured and purchased prior to August 31, 2012  
• Eligible equipment: Refrigerated vending machine or non-refrigerated snack vending machine if controls are installed | $105 per Refrigerated Unit and $35 per snack machine |
| Lodging Guest Room Occupancy Sensor        | • HVAC savings, controls must be capable of either a 5°F or 10°F temperature offset.  
• lighting savings, at least 50% of all the lighting fixtures in a guest room – both hardwired and plug-load lighting – must be actively controlled.  
• Baseline: guest room or dorm room without occupancy controls.                                           | $80 per room                                 |
| ENERGY STAR® Pool Pumps                    | • Replacement of a single-speed pool pump with an ENERGY STAR® certified variable speed pool pump.  
• Applies to commercial applications, indoor or outdoor, with a pump size of up to 5 hp.  
• Motor-only retrofits are not eligible. multi-speed pumps are not permitted.                              | $600 per Pool Pump                           |
| Condenser Air Evaporative Pre-Cooling      | • Chemical/mechanical water treatment, control system for operation, air to condenser coils must pass through evaporative pre-cooling system, installed by a qualified contractor and commissioned, performance greater than or equal to 0.75, operation manuals must be provided.  
• If above conditions are not met, deemed savings approach can’t be used, M&V methodology will be utilized. | $75/kW and $0.12/kWh                         |
| Premium Efficiency Motors                  | • NEMA premium efficiency motors from 1 to 500 hp  
• Only Retrofit and New Construction                                                                                      | Tiered incentive paid per HP. Incentive Range: $100 to $5,000 per motor |

Tiered incentive paid per HP. Incentive Range: $100 to $5,000 per motor
INSPECTIONS
Pre-inspection Photos

- Service Provider should provide existing condition photos for each unique existing fixture type:
  - Profile of fixture where reported lamp can be seen
  - Close-up of wattage stamp on the lamp
  - Profile of the area to be retrofitted

- Pre-existing fixture area photos should have all lights turned on so that non-operating fixtures can be counted.

- Need photos of each space type to verify existing controls such as O/S, switches, personal tuning, etc.

DO NOT start work or remove any existing equipment until the pre-inspection is complete and approved by the Program Manager.
Post-Inspection Photos

Service Provider should provide post-inspection photos including:

- Profile shots of the fixture (close up of the fixture)
- Photos of the LED nameplate with model number (must be provided for each type LED installed and readable)
- Profile of the area the fixture is installed (where the fixtures listed on that line can be seen)
- Photos of various controls that are installed as part of this project (please zoom into areas that this would apply)
Photo Requirements

• Create a separate PDF file for each site. If there is only one site, you should only have one PDF file uploaded in EEPM that contains all of your photos.

• For each site, consolidate all photos into a single PDF file. If you attach multiple files with a single photo in each file, your project will be rejected for correction.

• All photos must be labeled. The label will help verify the area represented by line number or circuit ID.

**Oncor reserves the right to request additional photos if images are blurred or we cannot identify which area the photo represents.**
Service Provider Contact Requirements

Service Provider Inspection Contact:

• Cannot be the Customer
• Must be present for the inspections
• Knowledgeable of the measure detail and the location of the listed specific equipment
• Able to provide full access to the measures selected by the Inspector for the inspection
Equipment and Tools

- At the pre- and post-inspections, the Service Provider is responsible for providing the equipment and tools necessary to retrieve model numbers and lamp wattages for selected fixtures. This includes ladders, lifts, and any other equipment the Service Provider may need to prove reported project information.
- Service Provider should provide good pre- and post-photos of each fixture type such that Oncor understands, through photo documentation, the pre- and post-site conditions (this minimizes inspection time during an on-site inspection).
- Please refer to the Commercial Desk Inspection Checklists for Service Providers.
Facility Maps & Drawings

- Service Provider should provide a map or floor plan to help the Program Manager and Inspector locate all measures (fixtures) listed in the measures tab.
- For retrofit projects, a hand-drawn sketch can be used.
- Break down fixture locations with a map ID reference that is shown on the map or drawing, and in the measure.
- Service Provider should bring a copy of the map or floor plan to the inspections to share with the Inspector.
Lighting, Fixtures and Conditions

Outdoor Lighting Operation

- Service Provider must show any selected fixtures are operating during pre-inspection. This may include covering photocells, by-passing the timers, or overriding controls.

Non-Operational Fixtures

- Service Provider is responsible for an accurate count for the fixtures that are not operating when filling out the data entry information in EEPM.

Existing Conditions

- Service Provider is responsible for capturing the pre- and post conditions accurately. If controls and/or HVAC exist before project is started, be sure to identify these areas correctly for any fixture lines in the data entry fields in EEPM.
LIGHTING TIPS
Building Type, Controls, and Fixtures

• Pick one building type and stay with it! (Exception: Outdoor Lighting).

• For Outdoor Lighting, select “Outdoor” for the pre- and post-equipment controls.

• Outdoor Lighting – Dusk to Dawn Building Type requires a Customer e-mail or letter stating the lights operate dusk to dawn via photo cell, timer, or other controls.

• 2 or 3 Shift Manufacturing Building Type requires a Customer email or letter stating the actual hours and week days of operation for each Shift, and if the hours are seasonal.

• In spaces with large areas of the same fixture do not combine. These should be broken down into smaller segments and fixture quantities (e.g. Row A, Row B - 1, Row 1 starting at north wall).

• In rooms to be retrofitted, list all fixtures, even the lighting that is not planned for replacement.

• For lighting not being replaced, the pre- and post-retrofit fixture code and quantity will be the same.
Removing a Site

- If your final project has fewer sites than originally uploaded, edit the data entry information to make the pre- and post-equipment and quantities the same for the sites that are not included (zero out).
- Do not delete a site ESI ID.
- Add comments in EEPM that the site savings were zeroed out.
Qualified LEDs

• Make sure the post-retrofit fixture wattage matches what is installed. For LEDs, this should be the DLC or ENERGY STAR® wattage, rounded up or down to the closest ½ watt.

• Screw-in LEDs are eligible for incentives in appropriate applications (i.e. no track lighting, heat lamps, or plug loads).

• Only Type “C” LED tubes are allowed and must be qualified by DLC. The incentive is a flat $6.00 per fixture.

• Make sure the reported LED model number in EEPM matches the installed LED nameplate, and is consistent with the DLC, or ENERGY STAR® documentation/screenshot. List the model number found on the fixture and do not use the wildcard characters found in DLC or ES. Please see next slide as an example.
DLC Screenshot Example

- The reported LED Fixture Code in EEPM for this example should be: **LED080-FIXT**

- The reported LED Model in EEPM for this example should be: **ASD-WLP01-80D50**
Non-Qualifying Lighting

- LEDs that are not ENERGY STAR® or Design Lights Consortium (DLC) qualified
- Plug Load and Track Lighting
- LEDs used as heat lamps
- Use of non-qualified LED in new construction may reduce incentive amount
- Incentives are not paid when metal halides and high- and low-pressure sodium are installed as post-fixtures
- Any LED tube other than Type “C” LED tubes are not eligible for incentives
Light Levels, Retrofits and Ballasts

IES Recommended Light Levels

- Lighting Projects must meet Illumination Engineering Society (IES) recommended light levels to qualify for an incentive.
- Lighting retrofits that reduce the number of fixtures by 15% or more may be required to submit a lighting simulation that includes all lighting being installed.

Fluorescent Luminary Retrofits

- T-12 lamps and magnetic ballasts qualify for retrofit using a T-8 lamp and electronic ballast baseline.

Electronic Ballasts

- Electronic ballasts must be CEE-approved and/or classified as NEMA Premium, and have a Total Harmonic Distortion (THD) of no greater than 20%.
Project Documentation Reminders

Indoor and Outdoor Lighting

• Consolidate each of the following in single PDF files:
  • Pre and Post nameplate, fixture, and area photos (if multiple sites, provide separate files for each site)
  • DLC and Energy Star certification sheets
  • LED manufacturer specification sheets (should show ordering code breakdown and descriptions)

Outdoor Lighting

• Outdoor Lighting – Dusk to Dawn Building Type requires a Customer email or letter stating the lights operate dusk to dawn via photo cell, timer, or other controls.

Manufacturing Shifts

• 2 or 3 Shift Manufacturing Building Type requires a Customer email or letter stating the actual hours and week days of operation for each Shift, and if the hours are seasonal.
Project Documentation

New Construction Projects

- Plans of the facility must be signed and stamped by an Architect/Engineer (A/E) showing the square footage for the indoor and outdoor areas (paved parking/driveways square footage only, all non-parking/driveways should not be included). Also the A/E lighting schedule and lighting layout must be provided. **Circle or highlight the square footage numbers on the plans.**

- A COMcheck document can be used in lieu of the A/E plans for the square footage.
MINIMUM EQUIPMENT STANDARDS
Lighting

LED Lighting

• Must be listed with DLC or ENERGY STAR®
HVAC (Minimum Equipment Standards)

HVAC Units

- Must be AHRI certified (consolidate all AHRI certificates in a single PDF file).
- Unit model number must exactly match the AHRI certificate model number.
- Post unit photos required of nameplate (showing model and serial number) and entire unit (consolidate all photos in a single PDF file).
- For larger units, Chillers, and Water Cooled DX units that do not have an AHRI certificate, a manufacturer simulation is required showing unit performance at 100% load and at AHRI conditions (required temperature and flow rate inputs for the simulation can be requested from the Program Manager).
Program Reminders

Insurance

• Keep insurance current throughout the calendar year!
• Start renewing your insurance at least one month before it expires.

Company Name and Tax ID

• If you change your company name or Tax ID during the year, contact the Program Manager immediately!

Pre-inspection Approval

• DO NOT start work or remove any existing equipment until the pre-inspection is complete and approved by the Program Manager. The Reservation of funds document must be signed before starting work.
• The Program Manager will notify the Service Provider when they can begin installation.
Program Reminders (cont’d)

Rollover Projects

• Projects that cannot complete in 2023 may be allowed to “rollover” to the next program year if the Oncor Program Manager is notified by September 15, 2023.

• Projects may be submitted until November 15, 2023 and may complete in the next year.

• Rollover projects must be completed by May 31 of the following year, or will be subject to cancellation.
Program Reminders (cont’d)

Requirements for on-site and desk review inspections

Pre-inspection photos

Post-inspection photos

**Actual images of pre and post commercial projects**
CONTACT INFORMATION
Contact Information

Ron Haskovec
Ron.Haskovec@oncor.com
214-486-5160

Paul Jacks
Paul.Jacks@oncor.com
214-486-2560

Kim Hooper
Kim.Hooper@oncor.com
214-486-3158

EEPM Help Desk
eepmsupport@oncor.com
866-258-1874

Matt Taylor
Matt.Taylor@oncor.com
214-486-5488

Insurance Coordinator
eepminsurance@oncor.com
866-258-1874

CONTACT US