



FY24 Business Solutions Retrocommissioning Program Manual

May 1, 2023

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1.1 PROGRAM OVERVIEW

One of the primary objectives of SRP's Business Solutions energy efficiency portfolio is to offer our customers every opportunity to help manage their energy expenses. SRP's suite of available program initiatives provides rebates for nearly every energy-efficient technology and product available in today's market. When customers are not looking to undertake significant facility changes, retrocommissioning can be an option to save additional energy. SRP's Business Solutions Retrocommissioning Program (RCx Program) offers energy analysis services to identify low-cost energy efficiency measures as well as provide incentives to assist customers in implementing the identified measures.

The SRP RCx Program helps customers achieve demand and energy savings in commercial and industrial facilities. The systematic evaluation of facility systems finds cost-effective measures to improve facility operation, and, in many cases, also improve occupant comfort, and production efficiency.

1.1.1 Traditional Retrocommissioning (50,000+ sq. ft. or 1,000,000+ kWh annual usage)

A Traditional Retrocommissioning (Traditional RCx) service rebate is available to large facilities, which also provides a savings rebate opportunity for implementing identified measures. Section 3 and Section 4 outline the building-owner commitment, eligibility requirements, and rebate structure. Traditional RCx study services are conducted through an SRP Qualified Service Provider, as outlined in Section 2. The building owner/ customer is responsible for contracting to implement recommended RCx measures.

1.1.1.1 Monitoring-based Commissioning (150,000+ sq. ft. or 3,000,000+ kWh annual usage)

Large customers participating with eligible projects may choose to follow a Monitoring-Based Commissioning (MBCx) path rather than a Traditional RCx path if desired, which permits the customer to take a more data-driven, continuous adjustment approach. Once the MBCx monitoring software integration is in place, the rest of the program will progress in a similar process as that of the Traditional RCx program described above.

New construction facilities meeting the MBCx size requirements are eligible to participate in the MBCx path but do not qualify for the Traditional RCx or Building Tune-up rebate tracks. However, customers may be eligible for rebates under the New Construction, Standard, or Custom Business Solutions Programs. Section 3 and Section 4 outline additional requirements and incentive structures. MBCx analyses will be provided by a Qualified Service Provider, as outlined in Section 2 and Section 4.

1.1.2 Mid-sized Facilities Building Tune-up (15,000+ sq. ft.)

Smaller buildings not eligible for the Traditional RCx path and larger buildings not interested in the Traditional RCx path or MBCx path (if eligible), may choose to take the Mid-sized Facilities Building Tune-Up (Building Tune-Up) path if the facility HVAC is a packaged HVAC system. Additional requirements and incentive structures are outlined in Section 3 and Section 4. The Building Tune-up analysis will be provided by an Energy Efficiency Alliance Member, as outlined in Section 2.

1.2 CONTACT INFORMATION

SRP has retained Resource Innovations as the Program Administrator for the SRP RCx Program. Direct questions about the program to the Program Administrator via:

Web

- www.savewithsrpbiz.com

Telephone

- Customer informational hotline: (602) 236-3054
- Qualified Service Provider direct line: (602) 236-1611

- Fax

- (480) 345-7601

Email

- Customer inquiries: savewithsrpbiz@srpnet.com

- Mail

- SRP Business Solutions Retrocommissioning Program
3100 W Ray Rd Ste 230
Chandler, AZ 85226

1.3 MANUAL USE AND ORGANIZATION

Facility owners, property managers, and O&M staff, please use this program manual organized in the following sections:

Section 2 addresses customer, measure, and eligibility requirements

Section 3 discusses the rebate format

Section 4 outlines the program participation process

1.4 PROGRAM DATES

SRP's FY24 RCx Program is valid from May 1, 2023, until April 30, 2024. RCx Program rebates are not eligible for prior customer-funded retrocommissioning activities or without necessary pre-approvals.

2.1 ALLIANCE PARTICIPANTS

The RCx Program delivers retrocommissioning activities and services through approved Energy Efficiency Alliance Members (EEA Member) and Qualified Service Providers (QSP) referred to collectively as Alliance Participants in this document. The Alliance Participants are independent contractors for the SRP Programs and are not authorized to make representations or incur obligations on behalf of SRP. Participation as an Alliance Participant does not constitute an endorsement by SRP, nor does it certify or guarantee the quality of work performed.

A listing of Alliance Participants with experience in identifying project opportunities is available online at www.savewithsrpbiz.com or by contacting the Program Administrator.

To be listed as an EEA Member or QSP, interested firms should contact the Program Administrator and request an application. Note: QSPs are a subset of the contractors that make up the EEA Members with QSPs having completed additional training with SRP for providing energy efficiency studies and associated energy efficiency services.

3.1 CUSTOMER ELIGIBILITY

For SRP’s energy efficiency programs, a customer is a company or organization that receives electric service from SRP under an approved SRP price plan. A customer is a holder of a single account, multiple accounts in the aggregate, or corporate accounts. A customer who is the holder of multiple accounts or corporate accounts with a single SRP customer identification number will be considered a single customer and may participate in multiple SRP programs subject to rebate caps and program requirements.

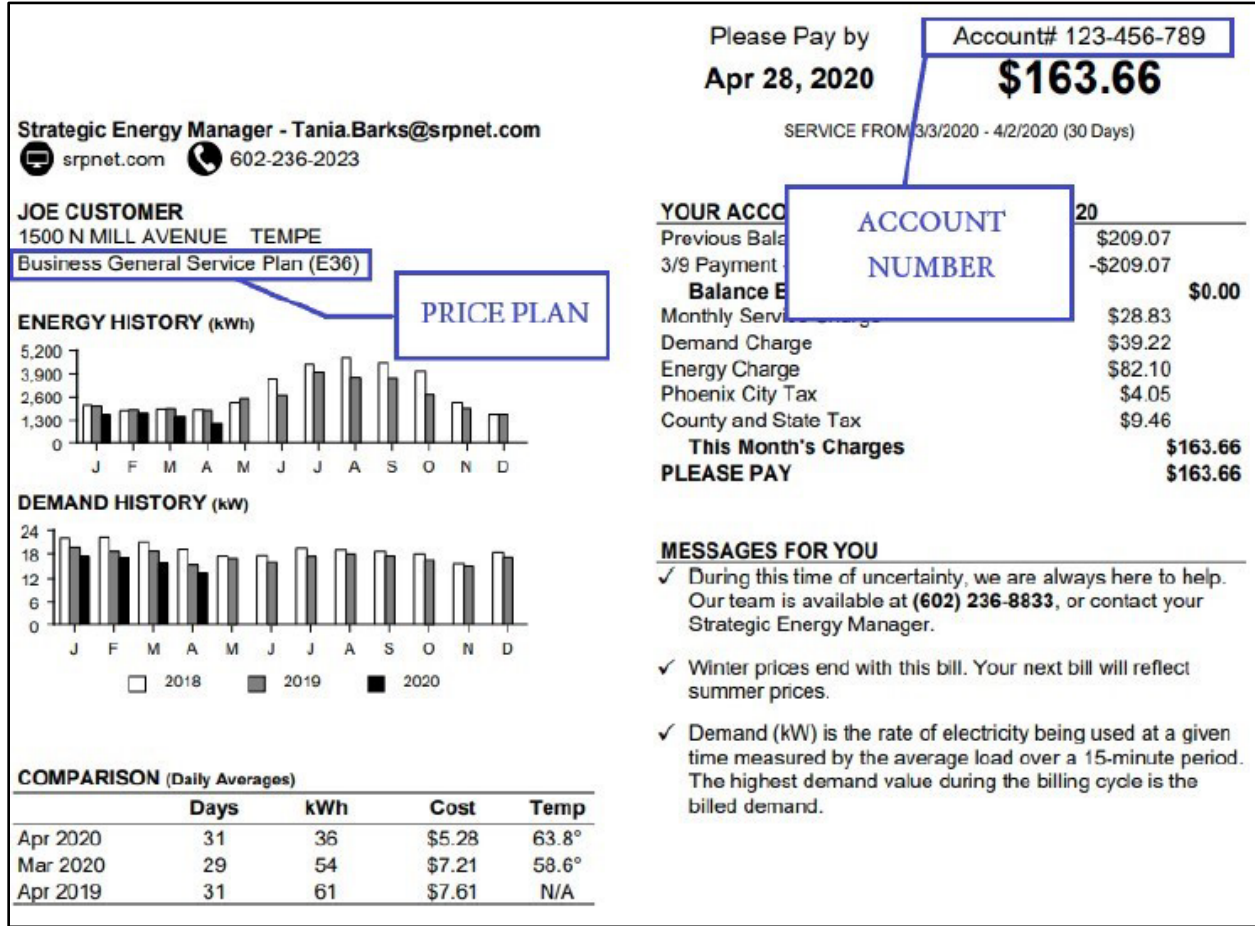
To participate in the RCx Program, customers must purchase electricity from SRP on an eligible non-residential retail electric price plan. Table 3.1 lists eligible customer price plans. SRP retains the right to make the final determination of customer eligibility.

Table 3.1: Eligible Price Plans for SRP Business Solutions Retrocommissioning Program

Description	Price Plan
General Service	E-31
Time-of-Use General Service	E-32
Super Peak Time-of-Use General Service	E-33
M-Power for Pre-Pay General Service	E-34
Standard General Service	E-36
Standard Pumping Service	E-47
Time-of-Week Pumping Service	E-48
Standard Large General Service	E-61
Primary Large General Service	E-63
Substation Large General Service	E-65
Substation Large General Service with Interruptible Load	E-66
Large Extra High Load Factor Substation Large General Service	E-67

Customers can verify their price plan by looking at a recent bill. Figure 3.1 shows where to find the price plan and account number on a typical SRP customer bill. Customers with questions regarding their account should contact the Program Administrator or their SRP Account Manager. SRP retains the right to make the final determination of customer eligibility.

Figure 3.1: Representative SRP Electric Bill



3.2 FACILITY ELIGIBILITY

Active Involvement:

The facility owner and O&M staff must commit to being actively involved in the retrocommissioning process. Active involvement for all RCx Program Paths will include:

- Providing access to the facility.
- Providing access to the facility Energy Use Systems.
- Giving time for facility personnel to interface with the QSPs.
- Providing and assisting with the reporting and collection of information about the retrocommissioning of the facility.
- Meeting attendance to support project progress and review milestone deliverables.
- Meet minimum spending commitments (outlined below).

Time Commitment:

Traditional RCx Path: The estimated time commitment from the customer to support the retrocommissioning effort is 60 to 100 hours of a senior facility engineer or manager over the 8 to 12-month project duration.

MBCx Path: The estimated time commitment from the customer to support the retrocommissioning effort is 60 to 100 hours of a senior facility engineer or manager over the 8 to 12-month project duration. MBCx integration may require 30-50 hours for hardware and software integration support, with integration taking 3 months to 1 year.

Building Tune-up Path: The estimated time commitment for the customer to support the retrocommissioning effort is 8 to 12 hours of facility staff who are familiar with the age, condition, controls, and maintenance of the packaged HVAC equipment.

Application Review Requirements:

In reviewing project applications, SRP will also look for evidence that cost-effective retrocommissioning opportunities exist. SRP will consider the following factors when reviewing customer RCx applications in addition to the specific factors listed under each RCx Program Path (See [Section 3.2.1](#), [Section 3.2.2](#), and [Section 3.2.3](#)):

- The facility should have accessible and up-to-date building documentation and records.
- The facility should have a relatively high Energy Use Index (EUI) compared to the average EUIs of buildings of the same class and/or have a low ENERGY STAR rating from the Portfolio Manager.
- The facility should be free of significant problems requiring capital repairs or replacements and have no planned major system renovations or retrofits.
 - A significant renovation is a change in facility use or where the existing system will not meet owner/customer projected requirements within the existing facility square footage.
 - A retrofit is a change, modification, or addition to systems or equipment in existing facility square footage. The Program Administrator will determine the eligibility of facilities with proposed renovations.

3.2.1 Traditional RCx (50,000+ sq. ft. or 1,000,000+ kWh annual usage)

- The facility should be at least two years old with at least 50,000 sq. ft. of conditioned floor space or have a minimum facility annual usage of 1,000,000 kWh.
- The facility must have an existing and functional building or system-level energy management system (EMS) with direct digital control (DDC) and provide access to the QSPs.

SRP will screen program participants based on the above considerations and based on the level of opportunity for savings. SRP's selection decisions will be final and binding for all parties.

3.2.2 Monitoring-Based Commissioning (150,000+ sq. ft. or 3,000,000+ kWh annual usage)

- For facilities applying under the MBCx track, SRP will consider the following additional factors:
 - Existing facilities must have at least 150,000 sq. ft. of conditioned floor space or a minimum facility annual usage of 3,000,000 kWh.

- The customer must commit to a contract with an SRP-approved Service Provider for MBCx software and hardware integration and at least 24 months of monitoring after integration.
- New construction must have at least 150,000 sq. ft. of conditioned floor space and the customer must commit to a contract with an SRP-approved service provider for MBCx software and hardware integration and at least 12 months of monitoring after agreeing to the post-installation operation for any current New Construction Solutions (NCS) project if applicable or after the facility reaches steady operation. (New construction facilities are not required to meet the two-year age requirement to participate in the MBCx track, but must be operating under steady operation.) This 12-month contract must start after the completion of the post-installation operation or steady operation as the program is not designed to cover monitoring during start-up.
 - The facility must have an existing and functional building or system-level energy management system (EMS) with direct digital control (DDC) and provide access to the QSPs.

SRP will screen program participants based on the above considerations and based on the level of opportunity for savings. SRP's selection decisions will be final and binding for all parties.

3.2.3 Mid-sized Facilities Building Tune-up (15,000+ sq. ft.)

In reviewing Project Applications, SRP will also look for evidence that cost-effective, building tune-up opportunities exist. SRP will consider the following factors when reviewing customer applications:

- The facility should have an ENERGY STAR® Portfolio Manager rating of 70 or less
 - A facility that cannot be rated using Portfolio Manager will be benchmarked by using CBECS 2018 average EEI data for principal building activity, building floor space, and annual consumption. The facility EEI must be 10% higher than all three averages to be eligible for participation in the program.
- The facility should be at least 2 years old and have at least 15,000 sq. ft. of conditioned floor space.
- The facility should be free of significant problems requiring capital repairs or replacements and have no planned major system renovations or retrofits.
 - A significant renovation is a change in facility use or where the existing system will not meet owner/customer projected requirements within the existing facility square footage.
 - A retrofit is a change, modification, or addition to systems or equipment in existing facility square footage.
- The facility must have single-package, unitary HVAC equipment.

SRP will screen program participants based on the above considerations and based on the level of opportunity for savings. SRP's selection decisions will be final and binding for all parties.

4.1 REBATES

4.1.1 Traditional RCx & MBCx

The RCx Program offers a service rebate and building owner rebate for customers participating in both the Traditional RCx and MBCx paths. SRP fully funds the retrocommissioning analysis and technical assistance. Additionally, the customer may be eligible to receive a rebate for measures implemented and verified on time under the program.

Service Rebates:

In the program, retrocommissioning services are conducted exclusively by pre-approved QSPs for both Traditional RCx and MBCx. SRP covers retrocommissioning service costs at 100% for a QSP to investigate, identify, and verify savings opportunities. QSPs are eligible for incentives at \$0.052/kWh after the Investigation Phase and \$0.028/kWh after the Verification Phase. QSPs who actively solicit an RCx project will be eligible to receive \$0.06/kWh after the Investigation Phase and an additional incentive of \$0.04/kWh after the Verification Phase for each solicited project. Service payments issued during the Investigation Phase will be no more than 15% of the customer's annual energy usage. QSPs with projects participating under the MBCx path will be eligible to receive the same incentives as the Traditional RCx path.

Building Owner Rebates:

Program participants cover the costs associated with the implementation of the recommended energy efficiency measures and are required to spend at least \$3,000 or the total cost of the recommended measure package if less than \$3,000. Program participants are also required to contract and arrange for the implementation of a set of agreed-upon retrocommissioning measures (RCMs) that result in an estimated total project simple payback of 2 years or less, before rebates and based on electric and associated gas savings, and are responsible for covering the costs associated with attending meetings and assisting QSPs in acquiring facility information. To help offset implementation costs that exceed the customer's minimum commitment of \$3,000, the customer may be eligible to receive a rebate paid at \$0.05/verified kWh saved plus \$100/average peak period¹ kW reduced. These rebates are subject to a 100% cost cap, and are only available after the minimum \$3,000 commitment is met. Eligible measure costs are "external" or "3rd party" costs incurred by the customer in connection with the detailed evaluation, construction, installation, and implementation of an eligible measure. A customer's internal labor costs are **not** eligible for determining the building owner incentive cost cap. A customer using internal labor with costs of at least \$3,000 will retain eligibility to receive the remaining QSP services, though the customer will be ineligible for any building owner incentives. If a customer uses a combination of internal and external labor, the actual invoice or purchase order costs will be used for the customer rebate.

Building owner rebates are contingent upon implementing the agreed-upon RCMs within 120 days following the Investigation Phase report review meeting (or a longer timeline if agreed upon by SRP) and after the first year's energy savings are verified. Upon successful implementation of the agreed-upon RCMs to meet the minimum customer commitment of \$3,000, building owner rebates may be available for additional measures implemented within 1 year of the completion of the initial Verification Phase report.

Customers participating under the MBCx path are eligible for incentives for the integration of MBCx software into the customer's EMS (hardware). To be eligible for software and hardware integration

¹ The program peak period is defined as the hours during 4 p.m. to 7 p.m. Monday – Friday, July and August.

incentives, participants must contract with an SRP-approved QSP for MBCx software integration and at least 24 months of monitoring after integration. Once the MBCx software integration is complete, the customer is eligible to receive an incentive of 50% of the hardware and software integration costs, up to \$15,000 initially. The remaining 50% of the hardware and software integration costs, up to \$15,000 is reimbursable once the customer implements identified RCMs within the 120-day agreement timeframe following the Investigation Phase report review meeting and after the QSP verifies the energy savings.

New construction customers participating under the MBCx path are eligible for incentives for the integration of MBCx software into the customer's EMS (hardware). To be eligible for software and hardware integration incentives, participants must contract with an SRP-approved QSP for MBCx software integration and at least 12 months of monitoring after integration after agreeing to the post-installation operation for any current New Construction Solutions (NCS) project if applicable or after the facility reaches steady operation. Once the MBCx software integration is complete, the customer is eligible to receive an incentive of 100% of the hardware and software integration costs, up to \$12,000.

Building owner rebates are subject to a maximum rebate of \$450,000 from May 1 through April 30 for all SRP programs, with a cap of \$300,000 for energy efficiency programs and a \$150,000* cap for Business EV chargers and Electrification rebates combined. *Electrification rebates are capped at \$50,000. Business EV equipment rebates are limited to a maximum of 75 Level 2 charging station rebates and 3 DC fast charging station rebates. All equipment and service rebates paid for the QSP services associated with all affected customer projects under the same program year will count against the overall customer rebate cap.

No additional rebates will be available to participants through this program. However, if there are energy efficiency measures beyond the scope of the RCx Program, the customer may seek to qualify for those measures through the Standard or Custom Business Solutions Programs.

4.1.2 Mid-Size Facilities Building Tune-Up (15,000+ sq. ft.)

In the program, building tune-up services are conducted exclusively by pre-approved Building Tune-up QSPs. SRP and the customer co-fund tune-up service fees of the Building Tune-up QSPs to investigate, identify, and implement savings Program eligible opportunities. Program participants are responsible for covering a portion of the Building Tune-up QSP's fees. Customers must agree to pay the Building Tune-up QSPs \$500 for every 50,000 sq. ft. of conditioned floor space with the customer agreeing to directly pay the Building Tune-up QSPs a minimum of \$500 for Building Tune-Up services.

No additional rebates will be available to participants through this program. However, other energy efficiency measures may qualify through the Standard or Custom elements of the SRP's Business Solutions Program.

4.2 REBATE CAPS AND AVAILABILITY

Rebate funding for the RCx Program is limited, and applications will be accepted on a first-come, first-served basis until all rebate funding is committed. After that time, customers will have the option to be placed on a waiting list for the order requests received by SRP. The current availability of rebate funds can be checked at www.savewithsrpbiz.com or by contacting the Program Administrator.

SRP's Business Solutions programs allow customers to participate in multiple programs subject to the rebate cap established by SRP and limited to the eligible measures outlined in the program manual of each program. The rebate cap is the maximum rebate amount that a customer is eligible to be paid for that program year. Customers are subject to a maximum rebate of \$450,000 from May 1 through April 30 for all SRP programs, with a cap of \$300,000 for energy efficiency programs and a \$150,000* cap for

Business EV chargers and Electrification rebates combined. *Electrification rebates are capped at \$50,000. Business EV equipment rebates are limited to a maximum of 75 Level 2 charging station rebates and 3 DC fast charging station rebates. All equipment and service rebates paid for the QSP services associated with all affected customer projects under the same program year will count against the overall customer rebate cap. SRP reserves the right to waive or adjust the rebate cap on a case-by-case basis and determine at their sole discretion the program year to which a rebate is attributed. Rebates are limited to the equipment, services, and costs outlined in the program manual, though customers may establish a separate contract between themselves and EEA Members at their discretion.

Section 5

Program Participation Process

5.1 Traditional RCx and MBCx Participation Process

The program administrative process for Traditional RCx and MBCx projects follows four program phases:

- 1) Application Phase
- 2) Investigation Phase
- 3) Implementation Phase
- 4) Verification Phase

This process is illustrated in Figure 5.1 and Figure 5.2 and additional information about each phase of the SRP RCx Program is provided below.

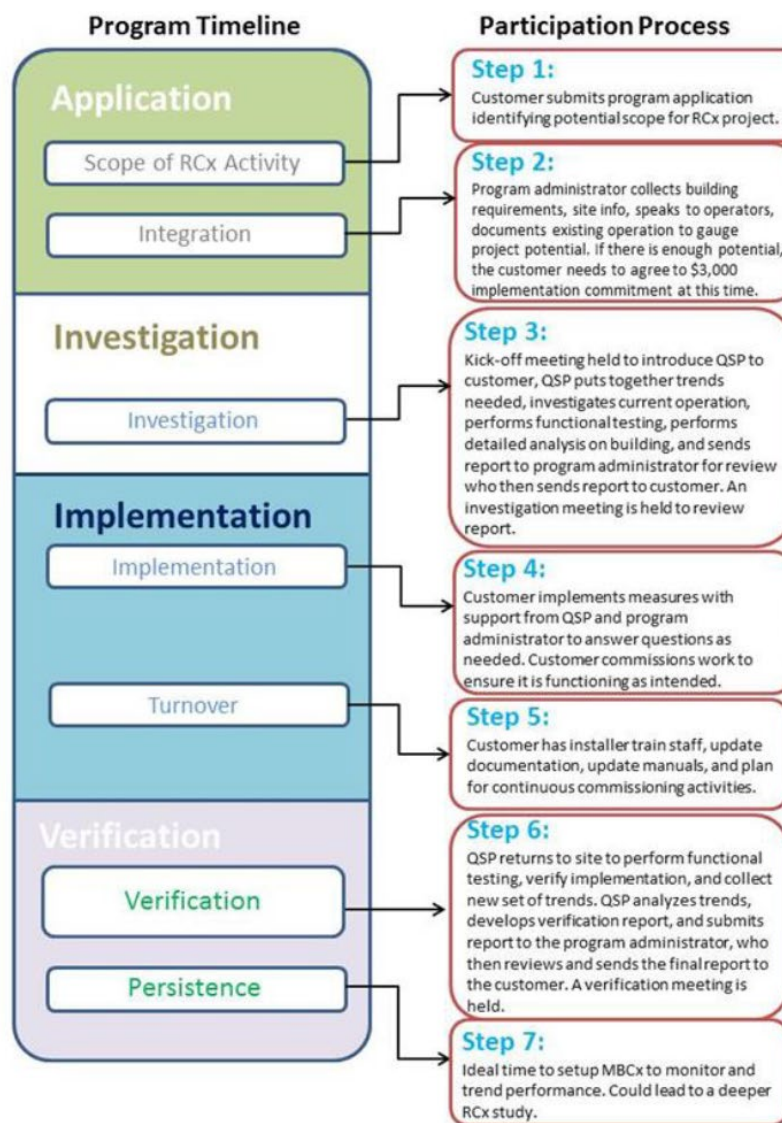


Figure 5.1: SRP RCx Program Participation Procedure – Traditional RCx

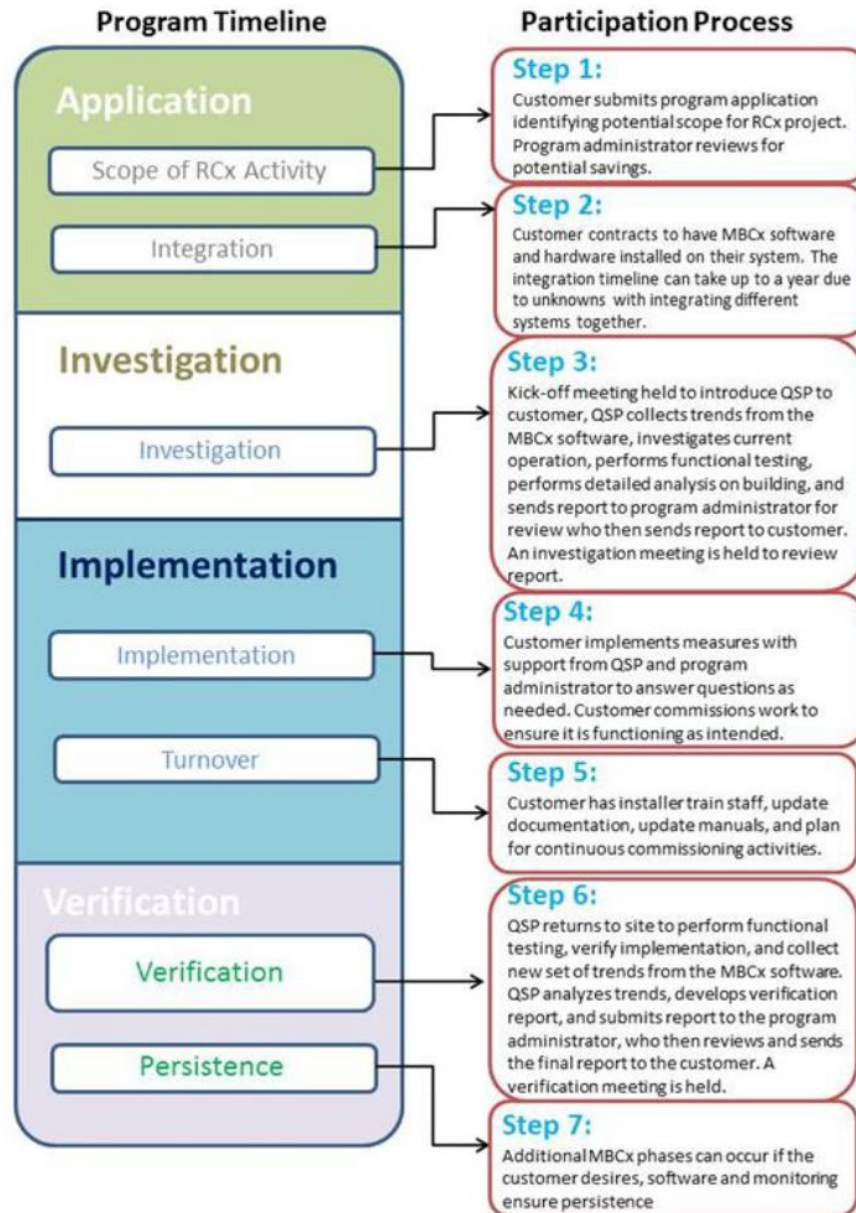


Figure 5.2: SRP RCx Program Participation Procedure – MBCx

5.1.1 Application Phase

A project begins with the Application Phase. The facility owner or representative completes the SRP RCx Program Project Application and submits it to the Program Administrator. Based on a review of submitted applications, the Program Administrator will select facilities with the highest perceived opportunity for savings to participating in the program. The Program Administrator will notify the customer of their acceptance into the program.

The Program Administrator will then conduct an onsite investigation with facility personnel to gauge building and system conditions as well as potential retrocommissioning opportunities. Facility energy usage information and the onsite investigation will be used for all feasible projects to prepare information about potential opportunities at the site. If the facility is not selected to participate in the program, SRP may recommend one or more of the other programs listed in Appendix A of this manual as a better fit.

If approved to participate in the program, SRP will send an approval confirmation. The Customer must wait for the approval confirmation from SRP before commencing the Investigation Phase. The primary purpose of the application phase is to agree to document the customer's commitment to spending at least \$3,000 for the implementation of mutually accepted retrocommissioning measures that result in a bundled estimated simple payback of 2 years or less, before rebates. Agreed-upon retrocommissioning measures must be implemented within the agreed-upon timeline to be eligible for service and equipment rebates under the program.

5.1.2 MBCx Integration (optional)

Customers may choose to pursue MBCx rather than following the Traditional RCx path. The MBCx path will allow customers to take a systematic, data-driven approach to achieve RCx savings using continuous monitoring to ensure that the customer implements RCMs successfully and that savings are persistent.

For projects qualifying under the MBCx path, the customer is responsible for contracting with an MBCx software-approved service provider (EEA Membership required) to integrate the MBCx software into their EMS. MBCx integration should allow for system monitoring necessary to establish baseline usage for the system. The integration timeline required to determine the customer's energy usage patterns can take significant time, so the Program Administrator will screen customers to ensure the overall program will not tie up considerable funds for integration time.

The customer is not required to contract directly with the QSP that is conducting the RCx services for an MBCx hardware & software package. However, if a customer chooses the MBCx path, they must contract with an SRP-approved QSP to provide at least 24 months (12 months for new construction facilities after the steady operation and finalizing New Construction Solutions projects) of monitoring and data trending through the integrated MBCx hardware and software package after completing the integration. The QSP or customer may aggregate trended data on other systems, but the data collection must be performed continuously with a trending interval of 15 minutes or less.

The MBCx trade ally will install the monitoring equipment and software at the customer's facility and test the system to ensure that everything is operating correctly and meets the program requirements. If approved by SRP to participate in the MBCx path, the customer may commence integrating software with the customer's system.

The service provider will make any necessary changes to the system. The MBCx trade ally is required to provide a record of the Scope of Work completed for the installation of the MBCx system, read-only

access to the Customer MBCx web portal, and a draft of an MBCx customer-facing report to the Program Administrator. The MBCx service provider must also provide the following to the Program Administrator (typically in an MS Excel file or CSV file): a list of all monitored equipment, a list of all monitored points, a sample of the trend data file pulled from the EMS system or another storage system, and a list of top 10-20 algorithms (i.e., Fault Detection Diagnostics, FDD) for identifying RCx measures. Upon receipt of the documentation, the Program Administrator will issue a rebate payment to the customer for 50% of the hardware and software integration costs identified in the submitted invoices or purchase orders, up to \$15,000.

Customer Role: Complete the Application and Agree to the Terms & Conditions

Deliverable: 1) Program Approval or Rejection Memo
2) Retrocommissioning Approval with SRP

Duration: Three to four weeks (MBCx integration may take an additional 3 months to 1 year)

5.1.3 Investigation Phase

The Investigation Phase includes activities such as conducting detailed site assessments, diagnostic testing, and trending analyses to evaluate current facility operating procedures, and equipment functionality. Investigation Phase activities must be performed by a program-approved QSP. The Investigation Report identifies retrocommissioning opportunities and details customer actions for achieving associated measure savings.

Upon completion of the assessment, the QSP will provide the customer with a copy of the Investigation Report which includes the Customer Selection Form. The Customer Selection Form summarizes the retrocommissioning measures and associated costs, savings, and economic impacts. This document communicates retrocommissioning opportunities and seeks customer approval to proceed with implementation. The implementation costs used to calculate project economics under the program are based upon reasonable market costs of the affected measures as approved solely by SRP's Program Administrator. Resources to obtain market costs include, but are not limited to, industry-accepted project estimation resources, vendor quotes, or professional judgment. The customer has the flexibility to utilize in-house staff or an outside contractor to implement retrocommissioning measures. Final implementation costs may vary from the estimated market costs. However, the market costs document customer implementation obligations for the \$3,000 commitment. Customers seeking the customer implementation rebate will be required to submit invoices or purchase orders to document all associated costs with the retrocommissioning implementation.

The Investigation Report and Customer Selection Form will be reviewed with the customer at an Investigation Review meeting to discuss and answer any questions regarding implementation. The customer will return the Customer Selection Form once they decide which measures they will implement, including the estimated implementation date. The customer shall not proceed with implementing measures before the completion of the investigation phase to allow proper baseline trending establishment. Measures implemented before the completion of this phase would be considered ineligible for any customer rebates.

Customer Role: 1) Assist with QSP's investigation activities
2) Program the data acquisition, trending, and retrieval of relevant building systems, equipment, setpoints, and operation as requested by the QSP

3) Complete the Customer Selection Form

Deliverable: 1) Investigation Report
2) Complete the Customer Selection Form

Duration: Eight to twenty weeks

5.1.4 Implementation Phase

After the QSP presents the Investigation Report, the QSP will work onsite with the customer's implementation team and assist in correcting the problems and implementing the agreed-upon retrocommissioning measures. The QSP will oversee the measure installation and ensure proper implementation. The customer's implementation team includes facility engineers, operational staff, and mechanical, electrical, and control contractors. For any retrocommissioning measures approved by the customer, the implementation team will implement the items associated with the relevant measures. The goal of this phase is to implement all agreed-upon retrocommissioning measures fully.

To the extent that the Program Administrator determines (in its sole and reasonable discretion) that the Customer failed to fulfill the Minimum Customer Implementation Commitment, The customer will be required to pay SRP the costs of the retrocommissioning services within 60 days of written notice from the Program Administrator.

Customer Role: 1) Contract or arrange for implementation activities
2) Manage the completion of recommended measures

Deliverable: Implementation of mutually accepted Retrocommissioning Measures

Duration: RCMs to satisfy the minimum customer implementation commitment should be implemented within 120 days of the finalization of the Investigation Phase. If this is met, additional measures implemented within 1 year of the Verification Phase meeting date may still be eligible for building owner rebates.

5.1.5 Verification Phase

During the Verification Phase, the QSP evaluates facility trended data (from data logging, the building EMS, facility sub-meters, MBCx software, or utility meters). The QSP also revisits the site to verify measure completion (e.g., new control strategies are functioning correctly, repairs completed, etc.). The QSP prepares and submits the final Verification Report that summarizes the findings and impacts of the project. During the verification meeting, the QSP will review the Verification Report findings with the customer as well as opportunities to set up MBCx to monitor and trend performance for savings persistence and more in-depth retrocommissioning opportunities if applicable. Verification phase activities must be performed by a program-approved QSP.

For MBCx & RCx: The customer is eligible to receive a rebate paid at \$0.05/verified kWh saved plus \$100/average peak period² kW reduced for any costs beyond the \$3,000 commitment if the customer implements the agreed-upon measures within 120 days of the Investigation Phase review meeting. Additional measures beyond the minimum customer commitment may be implemented within 1 year of

² The program peak period is defined as the hours during 4 p.m. to 7 p.m. Monday – Friday, July and August.

the Verification review meeting to remain eligible for building owner rebates. Customers must submit any invoices or purchase orders documenting implementation costs to the Program Administrator before the completion of the Verification Report to receive this rebate. Internal labor costs are not eligible for this rebate.

For MBCx only: The remaining 50% of the hardware and software integration costs, up to \$15,000 are reimbursable once the customer implements identified RCMs within the 120-day agreement timeframe following the Investigation Phase report review meeting and after the first year's energy savings are verified.

Customer Role: 1) **Support QSP's verification process**

2) **Program the data acquisition, trending, and retrieval of relevant building systems, equipment, setpoints, and operation as requested by the QSP**

3) **Submit invoices or purchase orders documenting the implementation costs to the Program Administrator**

Deliverable: **Verification Report with Final Investigation Report submittals**

Duration: **Three to ten weeks**

5.2 BUILDING TUNE-UP

The program administrative process for each project follows three primary program phases:

- 1) Application Phase
- 2) Implementation Phase
- 3) Verification Phase

This process is illustrated in Figure 5.3, and additional information about each phase of the Building Tune-up path is provided below.

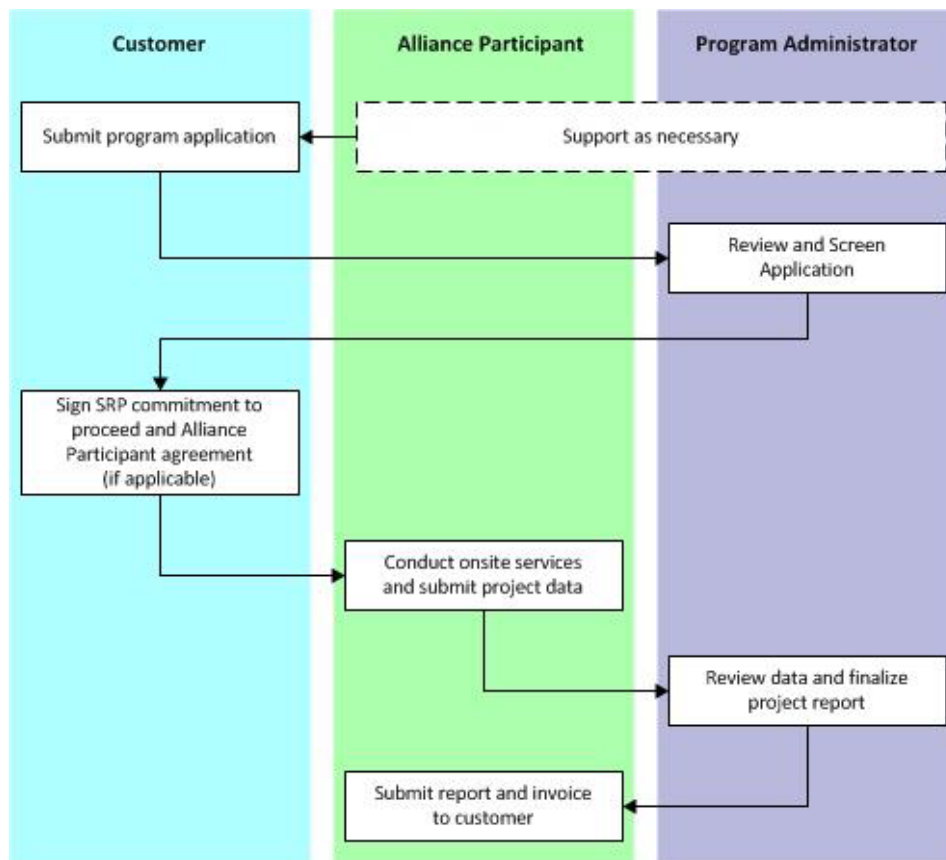


Figure 5.3: SRP RCx Program Participation Procedures – Building Tune-up

5.2.1 Application Phase

A project begins with the Application Phase. The facility owner or representative completes the SRP Building Tune-up Application and submits it to the Program Administrator. Based on a review of submitted applications, the Program Administrator will select facilities with the highest perceived opportunity for energy savings for participation in the program. Part of this screening process will include a review of the facility’s ENERGY STAR Portfolio Manager score or an analysis of the facility’s energy use index. If ENERGY STAR® Portfolio ratings are not applicable, facilities must have an Electrical Energy Intensity (EEI) 10% above the average principal building activity, building floor space, and annual consumption

EEl, as found in the Commercial Buildings Energy Consumption Survey (CBECS) 2018 for the western region.

The Program Administrator may conduct an onsite visit or telephone interview with facility personnel to gauge building and system conditions as well as potential retrocommissioning opportunities. Upon acceptance of a Project Application to the Program, the Program Administrator will prepare the Program Acceptance letter for the customer's signature.

If the facility is not selected to participate in the program, SRP may recommend one or more of the other programs listed in Appendix A of this manual as a better fit for the facility.

Customer Role: Complete the Application and Agree to the Terms & Conditions

Deliverable: **1) SRP to provide Customer with a Program Acceptance or Rejection Letter**
 2) If accepted, the Customer is to return the signed RCx Program Building Tune-up Acceptance Letter to SRP

Duration: **Two to three weeks**

5.2.2 Investigation Phase

Following acceptance of a project into the program, the Building Tune-up QSP will contact the customer to coordinate a schedule for the onsite building tune-up activities.

During the Investigation Phase, the customer's facility staff is welcomed and encouraged to support the Building Tune-up QSP as they conduct their assessment and implementation of eligible building tune-up measures. At a minimum, the customer's facility staff will be responsible during this phase for providing building documentation and supporting the Building Tune-up QSP's orientation and knowledge regarding the building.

The Building Tune-up QSP will investigate and address, as appropriate, a pre-screened list of potential measures. These measures include the following:

- Adjust HVAC and lighting equipment operating schedules
- Adjust air-side economizer operation
- Repair air-side economizer sensors
- Repair air-side economizer damper actuators
- Add D/X outside-air lockout controls
- Adjust minimum outside air intake percentage
- Clean evaporator and condenser coils
- Perform refrigerant recharge

SRP will reserve the right to determine at their sole discretion the final measures evaluated and included within the scope of the services co-funded by SRP.

Customer Role: Provide building documentation and support the Building Tune-up QSP's information collection process.

Deliverable: Building Tune-up QSP provides critical project data to SRP

Duration: Two to four weeks

5.2.3 Verification Phase

During the verification phase, SRP will evaluate the project data collected by the Building Tune-up QSP and prepare a summary report of the project impacts for the Building Tune-up QSP to provide to the customer along with an invoice for eligible customer costs due to the Building Tune-up QSP. No rebate is paid to the customer as the Building Tune-up program is only a service rebate.

Customer Role: Pay Building Tune-up QSP Invoice

Deliverable: Project Summary Report

Duration: Two to three weeks

SRP offers a range of energy efficiency opportunities to help commercial and industrial customers save energy and money. Reduced energy costs, technical assistance, and/or incentives are available for qualifying customers. A summary of other available commercial and industrial energy efficiency and electrification programs is provided below. Additional information regarding eligibility requirements, rebates, and participation processes is available at www.savewithsrpbiz.com or by contacting the Program Administrator.

SRP Business Solutions Standard Program

The SRP Business Solutions Standard Program promotes the purchase of industry-proven, high-efficiency equipment. Rebates serve to buy down the difference between the cost of high-efficiency and standard equipment, thereby making the high-efficiency equipment a more attractive option for customers. Rebates are available for qualifying lighting, HVAC, data center, building envelope, kitchen equipment, compressed air, and refrigeration measures.

SRP Business Solutions Custom Program

The SRP Business Solutions Custom Program provides a comprehensive platform for cost-effective non-residential energy efficiency projects not addressed by the SRP Business Solutions Standard Program. One of the primary goals of the program is to obtain verifiable, cost-effective, and persistent electrical energy savings that result from the installation of energy efficiency measures.

In addition to equipment rebates, SRP offers eligible customers the opportunity to receive energy efficiency assessments performed by a Qualified Service Provider (QSP). These assessments focus on a predefined system or scope of energy efficiency business practices, strategies, and capital improvement opportunities. They can provide both initial and investment-grade reports to assist customers in screening, evaluating, and prioritizing complex energy efficiency projects.

SRP Business Solutions New Construction Program

The SRP Business Solutions New Construction Program provides technical assistance and financial rebates to help architects, engineering professionals, and building owners optimize energy and demand savings, and reduce operating costs in commercial new construction projects. Projects must be new construction or major renovation and must be 20,000 square feet or greater for commercial, industrial, retail, multifamily, or core and shell use. Projects that are most likely to succeed in meeting the program's goals will be accepted. The program offerings are scalable for projects of varying sizes under two different tracks and flexible to grow with customer demand.

The Expedited Track is suitable for projects with accelerated design schedules that are unable to invest the time necessary for participating under the enhanced performance track. The buildings under this track will have less aggressive savings targets; typically, these buildings will have less than 75,000 square feet of conditioned floor space but must be $\geq 20,000$ square feet (new construction/renovation/additions).

The Enhanced Performance Track will offer two types of Energy Design Assistance (EDA) service incentives, Energy Modeling and Lighting Design Services Incentives. This track employs a whole building performance-based strategy that fosters an integrated design approach with the project's design team starting during the project's schematic design phase. Early involvement, combined with the comprehensive interaction of key project stakeholders, affords the opportunity to cost-effectively evaluate and incorporate efficiency strategies while design components are still fluid. Under the Enhanced Performance Track, the buildings will have $\geq 50,000$ square feet of conditioned floor space (new construction/renovation/additions).

SRP Business Solutions Retrocommissioning Program

The SRP Business Solutions Retrocommissioning Program helps customers achieve demand and energy savings in commercial and industrial facilities. Savings are realized through the systematic evaluation of facility systems and customer implementation of cost-effective, energy efficiency measures targeted to improve facility operation that, in many cases, also improve occupant comfort and production efficiency.

Program participants are customers with 50,000+ sq. ft. of conditioned space or 1,000,000 kWh in usage, which have demonstrated a commitment to spend \$3,000 or more to implement identified retrocommissioning measures with an estimated total project simple payback of 2.0 years or less, calculated before rebates and based upon electric and associated gas savings. A streamlined Building Tune-up program is available for customers with facilities 15,000+ sq. ft. in size.

SRP Business Solutions Small Business Program

The SRP Business Solutions Small Business Program promotes the purchase of high-efficiency lighting and HVAC upgrades in small commercial and industrial facilities. No-cost assessments are available to qualifying customers to help identify lighting efficiency and HVAC upgrade opportunities. Rebates are also available to pre-approved installation contractors to buy down the difference between the cost of energy-efficient systems and standard lighting and HVAC equipment, thereby making the high-efficiency equipment a more attractive option for customers. Rebates are available for qualifying lighting and HVAC measures.

SRP Business Solutions Electrification Program

Thinking of switching to electrically fueled equipment at work? The SRP Business Solutions Electrification Program promotes the purchase of qualifying equipment to convert fossil-fuel-powered equipment to electricity to reduce carbon emissions and make for healthier and safer work environments. Rebates for electric forklifts, electric truck refrigeration, and electrified truck parking spots are available, with additional custom rebates available for site-specific equipment like industrial process heating or mid or large heavy-duty fleet conversions. More information can be found at <https://savewithsrpbiz.com/etech>, by calling 602-236-9650, or by emailing etechrebates@srpnet.com

SRP Business Solutions Business EV Program

The SRP Business Solutions Business EV Program promotes the purchase of qualifying charging equipment to power electric vehicles. Your customers and employees will welcome the convenience to charge at work, encourage customers to stay longer, and count this initiative towards your sustainability goals. The program provides per-port rebates for level 2 chargers. For technical assessments or program support visit <https://savewithsrpbiz.com/rebates/evcharger.aspx>

SRP Business Solutions Multifamily Program

The SRP Business Solutions Multifamily Program promotes the purchase of high-efficiency lighting, HVAC, building envelope, and tenant upgrades in apartments and other multifamily properties. Contractors promote rebates for both tenant spaces and common areas, with a variety of rebate opportunities available. Be on the lookout for more information at <https://savewithsrpbiz.com>

SRP Business Demand Response Program

SRP is collaborating with a company called Enel X to offer commercial, institutional, and industrial organizations incentive payments for participating in a new program to maintain a reliable and cost-effective electric grid. Between May and October each year, large energy consumers can earn payments for making targeted energy reductions during times of peak demand. Interested customers can contact their Strategic Energy Manager (SEM) for more details and to determine if they would be a good fit for the program.

A brief listing of energy efficiency resources available on the Web is provided below.

- AHRI Online Directory of Certified Equipment. The Air Conditioning, Heating, and Refrigeration Institute (AHRI) is a national trade association of HVAC equipment manufacturers. A publicly available online directory lists detailed equipment information for all certified equipment. (www.ahridirectory.org)
- Air Conditioning Contractors of America (ACCA). The ACCA is a non-profit organization representing HVAC contractors in the U.S. Current industry information and resources are available from their website. (www.acca.org)
- Consortium for Energy Efficiency (CEE). CEE is a non-profit organization that develops national initiatives to promote the manufacture and purchase of energy-efficient products and services. (www.cee1.org)
- Department of Energy – Energy Efficiency and Renewable Energy (EERE). EERE provides information for consumers on a wide range of energy efficiency topics. (www.eere.energy.gov)
- ENERGY STAR. ENERGY STAR is a government-backed program designed to help consumers increase their energy efficiency. (www.energystar.gov)
- Electrical Apparatus Service Association, Inc. (EASA). EASA provides its members with current information on materials, equipment, and technological advances in the electromechanical industry. (www.easa.com)
- National Electrical Manufacturers Association (NEMA). The Motor and Generator section of NEMA has developed an industry standard for premium efficiency motors. (www.nema.org)
- US Green Building Council (USGBC). USGBC is composed of more than 13,500 organizations from across the building industry that is working to advance structures that are environmentally responsible, profitable, and healthy places to live and work. (www.usgbc.org)
- Design Lights Consortium (DLC) is a non-profit organization whose mission is to drive efficient lighting by defining quality, facilitating through leadership, and delivering tools and resources to the lighting market through open dialogue and collaboration. (www.designlights.org)

What is Retrocommissioning?

Retrocommissioning is the systematic evaluation of facility systems and a customer's implementation of cost-effective, energy-efficiency measures targeted to improve facility operation and in many cases also improve occupant comfort. The process is similar to commissioning a new facility or process but is applied to existing equipment.

Why is Retrocommissioning important?

Most buildings, including new ones, have not been properly commissioned to ensure the intended performance of key systems. In addition, to restore or maintain service, strategies may have been implemented over time that does not address the underlying problems, often resulting in excess energy consumption.

What are the benefits of Retrocommissioning?

While every facility has different needs and opportunities, common benefits of retrocommissioning activities include:

- Improved system operation beyond preventive maintenance
- Improved equipment performance
- Increased O&M staff capabilities and expertise
- Increased asset value
- Energy and cost savings
- Improved occupant comfort
- Improved indoor environmental quality (IEQ)
- Improved building documentation

What is the rebate provided by the SRP Business Solutions Retrocommissioning Program?

Rebates available through the SRP Business Solutions Retrocommissioning Program include both service rebates paid to the pre-approved contractors to support the identification and verification of customer-implemented retrocommissioning measures as well as building owner incentives paid to the owner based on verified savings of implemented retrocommissioning measures.

Service rebates are paid directly to QSPs on a performance basis for the entire project with payments disbursed between the investigation and verification phases. Customers with qualifying facilities with at least 50,000 sq. ft. of conditioned floor space are responsible for spending at least \$3,000 towards the implementation of mutually agreed measures with a total project cost resulting in an estimated payback of 2.0 years or less. Building owner rebates are paid at \$0.05/verified kWh saved plus \$100/average peak period kW reduced, covering up to 100% of invoiced costs that exceed the customer's minimum commitment of \$3,000. The verified kWh savings will be limited to the first year of electrical energy savings. The peak period is defined as the hours from 4 p.m. to 7 p.m. Monday – Friday, July, and August.

Additionally, a Monitoring-Based Commissioning (MBCx) option is available for customers with 150,000+ sq. ft. of conditioned floor space or 3,000,000 kWh to utilize data analytics to find additional savings. The MBCx option provides rebates to customers for 50% of the software/hardware integration costs up to \$15,000 initially, with the remaining 50%, up to \$15,000, reimbursable after the project's verification phase.

Are there any rebate caps?

Customers are subject to a maximum rebate of \$450,000 from May 1 through April 30 for all SRP programs, with a cap of \$300,000 for energy efficiency programs and a \$150,000* cap for Business EV chargers and Electrification rebates combined. *Electrification rebates are capped at \$50,000. Business EV equipment rebates are limited to a maximum of 75 Level 2 charging station rebates and 3 DC fast charging station rebates. All equipment and service rebates paid for the QSP services associated with all affected customer projects under the same program year will count against the overall customer rebate cap. For SRP's energy efficiency programs, a customer is defined as a company or organization that receives electric service from SRP under an approved SRP price plan. A customer is a holder of a single account, multiple accounts in aggregate or corporate accounts. Multiple accounts or corporate accounts with a single SRP customer identification number will be considered as a single customer. An organization of this type can participate in multiple efficiency programs but will be subject to the customer cap.

Can customers with multiple facilities aggregate them together to meet minimum facility size requirements?

Aggregation of multiple customer sites is allowed when part of the same campus. Customers should contact the Program Administrator to discuss the eligibility of their facility before completing a Project Application if there are any questions.

Are customers eligible to participate in SRP's other energy efficiency programs and SRP's Business Solutions Retrocommissioning Program at the same time?

Yes, but individual measures may only receive rebates under one program. Measures identified for implementation under SRP's Business Solutions Retrocommissioning Program are **not** eligible for rebates under other program offerings.

Where can I find out more about this program?

Customers can learn more about the SRP Business Solutions Retrocommissioning Program and other SRP programs in the following ways:

Web

- www.savewithsrpbiz.com

Telephone

- Customer informational hotline: (602) 236-3054

Fax

- (480) 345-7601

Email

- savewithsrpbiz@srpnet.com

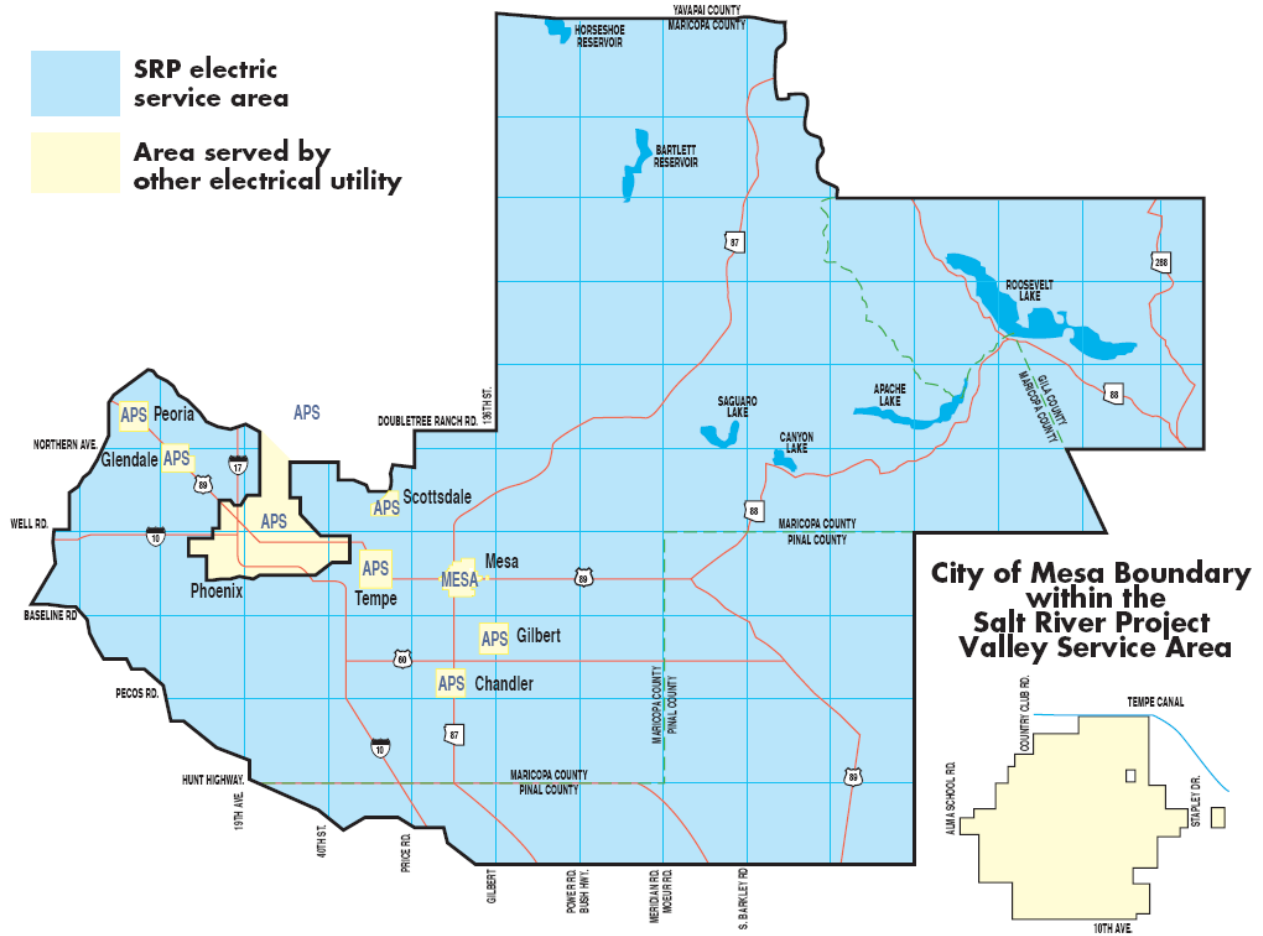
Mail

- SRP Business Solutions Retrocommissioning Program
3100 W Ray Rd Ste 230
Chandler, AZ 85226

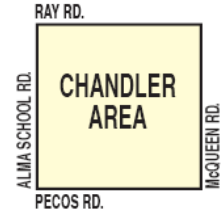
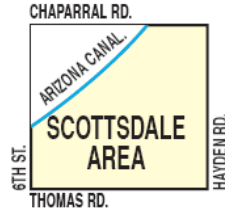
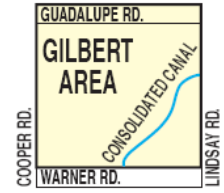
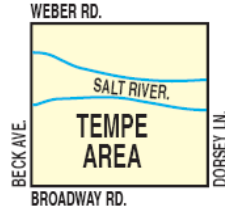
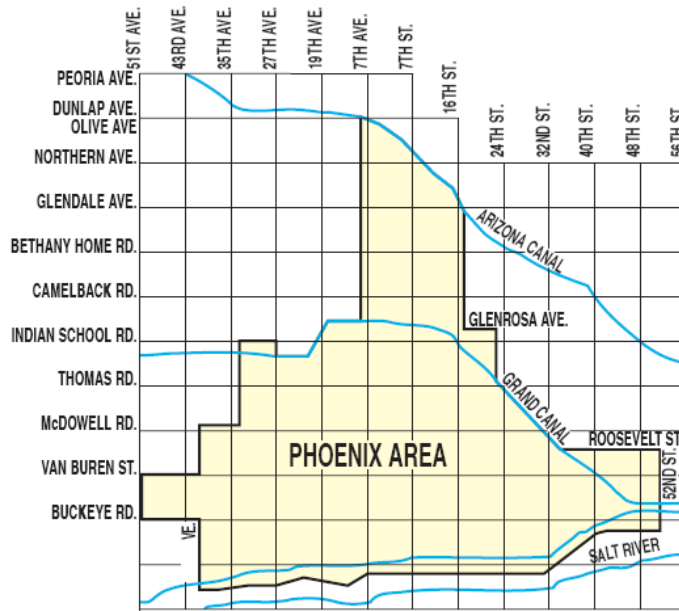
Appendix D

Service Territory Map

An illustration of SRP's service area is provided below. A more detailed map of the SRP service area is available by contacting the Program Administrator.



APS Boundaries within the Salt River Project Valley Service Area





Customer Hotline: (602) 236-3054

Qualified Service Provider hotline: (602) 236-1611

savewithsrpbiz@srpnet.com
