

PROGRAM MANUAL

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# Commercial Solutions Program



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Program Manual  
CPS Energy Commercial Solutions Program

## TABLE OF CONTENTS

<b>PROGRAM OVERVIEW.....</b>	<b>2</b>
PROGRAM OBJECTIVES .....	2
NOTES .....	2
GOALS .....	3
<b>PROGRAM ELIGIBILITY.....</b>	<b>3</b>
<b>PROGRAM ROLES &amp; RESPONSIBILITIES .....</b>	<b>5</b>
PROGRAM SPONSOR .....	5
PROGRAM IMPLEMENTER .....	5
PROGRAM PARTNER.....	5
NOTES .....	5
<b>INCENTIVES .....</b>	<b>6</b>
NON-CASH INCENTIVES.....	6
TECHNICAL ASSISTANCE & PROJECT IDENTIFICATION .....	6
COMMUNICATIONS & PUBLIC RELATIONS SUPPORT .....	6
CASH INCENTIVES .....	6
INCENTIVE BASIS.....	6
<b>INCENTIVE RESERVATION .....</b>	<b>8</b>
INCENTIVE PAYMENT .....	8
FUNDING LIMITATIONS .....	8
<b>PROJECT ELIGIBILITY.....</b>	<b>9</b>
PROJECT DEFINITIONS & REQUIREMENTS.....	9
ELIGIBLE MEASURES .....	9
<b>PROJECT APPLICATION PROCESS .....</b>	<b>10</b>
PROJECT IDENTIFICATION .....	11
PRE-INSTALLATION INSPECTION.....	11
INITIAL PROJECT APPLICATION (IA) .....	11

PROJECT APPLICATION REVIEW & INCENTIVE RESERVATION .....	11
FINAL PROJECT APPLICATION FORM (FA) .....	12
PROJECT INSTALLATION .....	12
PROJECT COMPLETION NOTICE .....	12
POST-INSTALLATION INSPECTION .....	12
INCENTIVE PAYMENT .....	12
PROGRAM PROCESS DIAGRAM .....	14
<b>PROGRAM ENROLLMENT/CONTACTS .....</b>	<b>15</b>
<b>DISCLAIMERS .....</b>	<b>18</b>
CONFIDENTIALITY .....	18
FALSE, MISLEADING OR INCORRECT INFORMATION .....	18
DISCLAIMER OF WARRANTIES .....	18
PROGRAM IMPLEMENTER IS AN INDEPENDENT CONTRACTOR .....	18
<b>DEFINITIONS .....</b>	<b>18</b>
<b>FREQUENTLY ASKED QUESTIONS (FAQs).....</b>	<b>19</b>
<b>APPENDICES .....</b>	<b>21</b>

## PROGRAM OVERVIEW

### PROGRAM OBJECTIVES

The Commercial Solutions Program is a market transformation program offered to qualifying commercial electric customers of CPS Energy.

Program Objectives include:

- Encourage delivery of energy efficiency products and services to the target market segment(s).
- Transform these markets over time by addressing specific barriers that hinder adoption of energy efficient technologies and practices.
- Provide a suite of educational and supporting services to facilitate the implementation of energy efficiency projects.
- Create a simple and streamlined program process to stimulate strong participation from the targeted markets.

The Program seeks to accomplish these objectives through a variety of services. First, the Program helps senior managers and facility supervisors operate their buildings more efficiently by understanding the technical and financial benefits of investing in energy efficiency and developing a plan to make energy efficiency improvements. Customers enrolling in the Program, referred to as Partners, receive technical and energy management assistance to help them make decisions about cost effective investments in facility energy efficiency. Partners also receive direct cash incentives for completed energy efficiency projects.

Other program services may include the identification and evaluation of opportunities for energy efficiency measures and communications support. The Program works with each Partner to determine the most appropriate set of services to offer in order to address both immediate and longer-term needs.

The Program does not require specific technologies or end uses, but instead provides a framework through which the Partner can receive incentives for implementing and installing a wide range of measures at their sites.

The Program, in addition to CPS Energy electric customers (Partners), involves the Program Sponsor (CPS Energy) and the Program Implementer (CLEAResult). The roles and responsibilities of each are defined in the “Program Roles & Responsibilities” section below.

### NOTES

Entering into an agreement with CPS Energy does not imply CPS Energy’s endorsement or approval of any products or services. CPS Energy makes no representation of the benefits of any particular technology or energy efficiency measure eligible for incentives under this program. The selection of an energy efficiency measure is at the discretion of the individual customer.



## Program Manual

### CPS Energy Commercial Solutions Program

- Reviewing and approving Project Application Forms, and
- Conducting and/or assigning formal on-site pre- and post-installation inspections of eligible projects to approve kW and kWh savings and incentive amounts,
- Making recommendations for higher efficiency options.
- Authorizing and issuing incentive payments for completed projects.

#### **PROGRAM PARTNER**

To participate in the CPS Energy Program, a Program participant, or Partner, will be asked to fulfill a combination of the following requirements, determined in conjunction with CLEAResult:

- Commit to the terms of the Program Letter of Intent (LOI) (see “Program Enrollment/Contacts” section for additional details),
- Submit Project Application Forms and all necessary supporting documentation for eligible energy efficiency projects in order to reserve incentives,
- Exert its best efforts to approve, fund, and install cost-effective energy efficiency projects identified through the Program before the end of the program year,
- Partner shall provide any and all project data including plans/drawings, equipment submittals, calculation forms, project narrative or scope, savings statement, and supporting invoices,
- Notify CLEAResult when projects are completed, and
- Provide access to project facilities and ample lead time both before and after project completion for inspection of the baseline and post-retrofit condition. New construction projects do not require any inspections prior to project completion.

#### **NOTES**

CPS Energy will not reimburse Partner for any costs it may incur by participating in the Program. Financial incentives for demand and energy savings are paid to Partners upon verification and approval of completed energy efficiency projects.

#### **INCENTIVES**

There are a number of program incentives available to Partners in order to assist with identification, evaluation, and implementation of eligible energy efficiency projects. Program incentives include a mix of cash and noncash incentives as described below. CLEAResult will work with enrolled Partners to determine the appropriate non-cash incentives to provide in addition to assisting with identification and development of projects that may be eligible for cash incentives.

#### **NON -CASH INCENTIVES**

**TECHNICAL ASSISTANCE & PROJECT IDENTIFICATION** – Program provides technical support to help Partners identify and evaluate energy efficiency opportunities in order to determine which projects are viable. As part of this service, the Program also educates senior decision makers on project financing options where funding sources are not immediately available.

**COMMUNICATIONS & PUBLIC RELATIONS SUPPORT** – Program provides press releases and other communications support to inform the community about the steps their area businesses are taking to improve the energy performance of their facilities, reduce operating costs, and use budget dollars more efficiently.

#### **CASH INCENTIVES**

The Program provides financial incentives, based on reductions in non-coincident electric demand (kW) and/or annual energy use (kWh) reductions at a Partner’s facility. These incentives help the Partner to “buy down” the

## Program Manual

### CPS Energy Commercial Solutions Program

incremental cost of purchasing more energy-efficient equipment and are meant to encourage adoption of construction and maintenance practices, which will reduce energy operating costs.

#### The incentives for eligible energy efficiency measures are:

Eligible Measures	Incentive \$/kW	Incentive \$/kWh
Lighting- Interior LEDs	\$325	\$0.05
Lighting- Exterior LEDs	\$250	\$0.05
Lighting- Non-LEDs	\$200	\$0.03
HVAC- Chillers	\$525	\$0.05
HVAC- DX/Controls	\$350	\$0.05
Building Envelope- General	\$200	\$0.03
Refrigeration- General	\$200	\$0.03
Custom/Other	\$200	\$0.05

### INCENTIVE BASIS

Funding is available to pay incentives for eligible energy efficiency projects in commercial facilities, which are paid on reductions in electric demand and/or energy savings depending on the measure.

Demand savings will be calculated as the total reduction (non-coincident) between the project baseline and the new, connected wattage of those same systems. Energy savings are defined as energy savings over the course of one 12month period and are calculated using approved operating hours from the Texas Technical Resource Manual (TRM) where possible.

Financial incentives received through the Program will be based on a project's reductions in non-coincident electric demand (kW) and energy consumption (kWh/yr) as determined pursuant to this Program Manual and the applicable Technical Resource Manual (TRM). Demand and energy savings will be calculated using the definitions provided above and according to one of three Measurement & Verification (M&V) approaches.

- **Deemed or Stipulated Savings:** The most common approach, deemed savings are standardized savings values or simple formulas for a range of measures in representative building types. This approach is suitable for a variety of projects where energy and demand savings may be estimated to a reasonable degree of accuracy without additional M&V. Variables such as operating hours, coincident usage with peak electric demand period, and energy consumption of existing equipment are assumed in these cases according to previously gathered field data. Example: replacing HVAC units or T12 lamps and ballasts with new, higher efficiency alternatives does not typically require field measurements.
- **Simplified Measurement and Verification (Simple M&V):** This approach typically requires only limited and short-term measurement and verification of equipment either before removal of existing equipment or after installation of new equipment, as compared with Measured Savings or Full M&V (described below) which requires both. Demand and energy savings are then verified through a post-installation inspection. Please contact the program when determining whether to employ the Simplified M&V or Full M&V approach. An M&V plan is required to be submitted before the project begins for this approach. Example: a motor replacement project would require spot measurements of current or power on the existing equipment

## Program Manual

### CPS Energy Commercial Solutions Program

- **Measured Savings or Full M&V:** This approach requires that actual measurements be taken and energy analysis conducted both before and after the project installation to calculate demand and energy savings. Savings will be verified by a post-installation inspection. Please contact the program when determining whether to employ the Simplified M&V or Full M&V approach. An M&V plan is required to be submitted before the project begins for this approach. Example: a compressed air project at a manufacturing facility would require continuous monitoring of power for 2 weeks before the retrofit and then again for 2 weeks after the project was completed.

The savings methodologies described above differ in terms of detail and rigor and some are chosen based upon the predictability of equipment operation, availability of evaluation data from previous programs, and benefits of the chosen M&V approach relative to its cost.

Please note that the Partner may be responsible for the arrangement of and costs associated with M&V activities for a project (if either simple or full M&V approaches are selected). These activities/costs are NOT required for program participation but may be justified for specific projects.

### **INCENTIVE RESERVATION**

Cash incentives are subject to availability and reservation. In order to receive cash incentives from the Program, Partner must first reserve incentives by completing and submitting a Project Application Form detailing the scope and timeline for each individual project and providing the Program Implementer with all necessary supporting documentation (please see “Project Requirements” section below for “Project Definition & Requirements”). The program will review Initial Project Application Forms that are submitted by customers and/or contractors to verify eligibility for that specific customer, measure, and equipment. The program will estimate savings and incentives for each Initial Project Application Form. Once a specific vendor, equipment selections, and construction timeline have been solidified for the project, the program will update savings and incentive estimates and treat that revised information as the Final Project Application Form. The incentive reservation amount may be adjusted during the course of the program year, according to changes in the estimated savings.

CPS Energy is not required to pay the Partner in excess of 100% of the incentives reserved for a particular project if the Program is fully subscribed at the time of project completion. For more information, please see the “Funding Limitations” section below. More detailed information about the Project Application process for reserving cash incentives from the Program is provided in the “Project Requirements” section.

### **INCENTIVE PAYMENT**

Any cash incentives received through the Program are paid directly to the Partner after the project is completed, verified, and, if necessary, a post-installation inspection is conducted. Funds will be delivered no later than the last day of the program year once the project is completed and verified. Partner or contractor (if authorized to receive incentive on behalf of customer) can choose to participate in the Electronic Fund Transfer (EFT), and the incentive payment will be deposited in electronically if desired. For projects that are utilizing either simple or full M&V savings methodologies, incentive payments will be made upon completion of all verification activities.

### **FUNDING LIMITATIONS**

Both the cash and non-cash incentive budgets available through the Program are limited. In the event that incentive reservations exceed the program budget for incentives, the Program is considered fully or oversubscribed. Project Applications that are submitted to the Program after the Program is fully subscribed will be added to a project wait list.

Any Partner submitting projects that are unable to receive cash incentives in the current program year due to oversubscription may choose to continue with their installation without incentives or delay the project and reapply for incentive funds during the next program year when additional incentive budget becomes available.

## PROJECT ELIGIBILITY

### PROJECT DEFINITIONS & REQUIREMENTS

A project, for program purposes, is defined as one (1) proposed electric demand energy savings measure type at one (1) facility owned and/or operated by the Partner.

All measures must and/or meet the following requirements:

- Must produce electric demand and/ or energy savings through an increase in energy efficiency.
- New equipment must exceed minimum equipment efficiency standards as described in the applicable TRM.

Comprehensive projects that include a range of measure types are encouraged, though each measure must be treated as a separate project for Project Application purposes. For example, light fixture retrofits and HVAC split system replacements at the same facility would need to be applied for as separate lighting and HVAC projects for that same facility.

### ELIGIBLE MEASURES

The energy efficiency upgrade measures in the list below are measurable by deemed savings calculations and are eligible in the Program. Savings based on the deemed savings approach apply where no unusual conditions exist. Deemed savings measures require no short-term testing or long-term metering.

Eligible Deemed Savings Measures	
<b>Lighting Efficiency</b>	<ul style="list-style-type: none"> <li>✦ Lamp and ballast replacements</li> <li>✦ High - intensity discharge (HID) fixture replacements</li> <li>✦ Hard -wired (or screw in with permanent locking mechanism) CFLs</li> <li>✦ LED lighting, traffic signals, etc.</li> </ul>
<b>DX Air Cooled Equipment</b>	<ul style="list-style-type: none"> <li>✦ Unitary air conditioner</li> <li>✦ Unitary heat pumps</li> </ul>
<b>Water Chilling Equipment (Chillers)</b>	<ul style="list-style-type: none"> <li>✦ Screw – air cooled</li> <li>✦ Reciprocating – air cooled</li> <li>✦ Reciprocating – water cooled</li> <li>✦ Rotary/screw/scroll – water cooled</li> <li>✦ Centrifugal – water cooled</li> </ul>
<b>Building Envelope</b>	<ul style="list-style-type: none"> <li>✦ ENERGY STAR® Qualified Roofing</li> </ul>
<b>Refrigeration</b>	<ul style="list-style-type: none"> <li>✦ Solid &amp; Glass Door Reach- Ins</li> <li>✦ Electronic Defrost Controls</li> <li>✦ ECM Evaporator Fan Motors</li> <li>✦ Evaporator Fan Controls</li> <li>✦ Cooler Night Covers</li> <li>✦ Strip Curtains</li> <li>✦ Zero- Energy Doors</li> <li>✦ Door Heater Controls</li> </ul>

<p><b>Food Service Measures</b></p>	<ul style="list-style-type: none"> <li>▪ Electric Convection Ovens</li> <li>▪ Electric Combination Ovens</li> <li>▪ ENERGY STAR® Dishwashers</li> <li>▪ ENERGY STAR® Steam Cookers</li> <li>▪ ENERGY STAR® Fryers</li> <li>▪ ENERGY STAR® Hot Food Cabinets</li> <li>▪ Vending Machine Controls</li> <li>▪ Pre-Rinse Spray Valves</li> </ul>
<p><b>Lighting &amp; HVAC Controls</b></p>	<ul style="list-style-type: none"> <li>▪ VFDs on Air Handlers</li> <li>▪ Lighting Demand EAFs</li> <li>▪ Occupancy Controls (Lighting &amp; HVAC)</li> <li>▪ Rotary/screw/scroll–water cooled</li> <li>▪ Centrifugal –water cooled</li> </ul>

Other measures may be eligible if they provide measurable and verifiable demand and/or energy savings, but require submission and implementation of an M&V plan. Please refer to the previous section, “Incentives Basis”, for further information on preparing and implementing an M&V plan.

## PROJECT APPLICATION PROCESS

Once a Partner has joined the Program, the Partner may begin submitting projects via a Project Application Form for approval. The purpose of the Project Application process is to provide Partners with security of reserved incentive funds. There is no financial commitment required to reserve incentives in the Program.

Application approval by the Program Implementer is required before incentive funds are reserved. Please note that Project Application Forms may include multiple projects on each form.

Below is a step-by-step process by which a Partner may identify a project opportunity and have it accepted into the program with financial incentives reserved. The cash incentive for a project is paid following this process:

- Project Identification;
- Pre-Installation Inspection;
- Initial Project Application;
- Project Application Review/ Incentive Reservation;
- Final Project Application;
- Project Installation;
- Project Completion Notice; • Post-Installation Inspection; and
- Incentive Payment.

### **PROJECT IDENTIFICATION**

The Program works with individual Partners to assist them in assessing their equipment, facilities and operations to identify eligible energy efficiency projects. See “Incentives” section for details on the assistance provided in identifying projects. Depending on volume or time of year, the Program may not be able to provide direct assessment assistance to all Partners. See “Project Eligibility” section for a list of measures eligible for incentives under the Program.

### **PRE-INSTALLATION INSPECTION**

For a *retrofit* project, Partner allows the Program Implementer access to the project site for the purpose of a preinstallation inspection. A pre-installation inspection must pass before any installation work can begin. Partners should allow up to four weeks for the Program Implementer to schedule and complete a pre-installation inspection. The Program Implementer will send an inspector to the site or sites to visually confirm and document the existence and condition of the equipment to be replaced, including make, model and serial number where applicable. The Partner must provide a knowledgeable representative to accompany the inspector on the preinstallation inspection. Warning: the Program Implementer cannot reserve incentive funds without a completed pre-inspection.

For a *new construction* project, Partners must submit a full set of design development/construction drawings or similar (in electronic, PDF file format) to program for review. These drawings are the supporting documentation for new construction projects.

### **INITIAL PROJECT APPLICATION (IA)**

While a project is defined as having one (1) single proposed demand savings measure type at one (1) facility, the Project Application Form allows a Partner to apply for multiple projects on the same form.

The Project Application Form should be signed and mailed, emailed or faxed to:

CPS Energy Commercial Programs Attn:  
CLEAResult  
Address: 8918 Tesoro Dr, Suite 108  
San Antonio, TX 78217  
Email: [cpsenergycommercial@clearesult.com](mailto:cpsenergycommercial@clearesult.com)  
Fax: (210) 904-8365

### **PROJECT APPLICATION REVIEW & INCENTIVE RESERVATION**

Once an Initial Project Application (IA) has been submitted to the program, the program staff will review each to see if the following meet eligibility requirements for participating in the program:

- Customer: Non-residential CPS Energy customer in good standing?
- Measure: Energy efficiency measure is allowed in program and will produce kW and/or kWh savings?
- Equipment: For the specific measure, what are the minimum efficiency or certification requirements for new equipment being installed?

## Program Manual

### CPS Energy Commercial Solutions Program

The Program Implementer will review each Project Application Form for completeness, accuracy and whether the listed measures qualify for incentive funding under the Program. CLEAResult will communicate with the Partner regarding necessary corrections and/or modifications to the application (additional information may be required).

The Program Implementer may deny approval of a particular Project Application Form for a variety of reasons, including, but not limited to:

- The Form is incomplete;
- The Form is received after all funding has been reserved by other Partners (see below “Waitlist” section);
- The Partner fails to meet program eligibility requirements;
- The Partner fails to submit the required supporting documentation;
- The Partner is found to have made material misrepresentations in the Form; and
- The Partner fails to comply with applicable federal, state and local laws and regulations.

If the Program Implementer denies approval of a Project Application Form, CLEAResult will follow up with the Partner to request specific information or recommend specific steps to revise the Form. The Partner can submit the revised Project Application Form and the Program Implementer will consider it for approval by the date the new submission is received.

In the event that all incentive funding has been reserved, additional Project Application Forms submitted will be placed on a waitlist in the order that they are received by CLEAResult. Partners will be notified of their project’s position on the waitlist. If additional incentive funding becomes available, waitlisted projects will be approved in the order received until the funding is fully reserved.

### **FINAL PROJECT APPLICATION FORM (FA)**

Approval of Project Application Forms and reservations of incentive funds are solely within the discretion of the Program. Incentive funds estimated in a Form are not officially reserved until the Program Implementer approves the Form.

### **PROJECT INSTALLATION**

Partner proceeds with the project installation. Partner must notify the Program Implementer immediately of any and all changes to the project scope, equipment selection, or timeline during installation.

### **PROJECT COMPLETION NOTICE**

After the project has been installed, the Partner will notify CLEAResult of the project’s completion as soon as possible in order to arrange a post-installation inspection of the project. Partner is expected to work with the Program Implementer to confirm (and update if necessary) the supporting documentation that accompanied the approved Project Application Form for the now completed project. Notice can be provided via email, telephone, or in writing to CLEAResult.

Partner agrees to submit to CLEAResult a copy of the final invoice for equipment cost, labor, and all other costs associated with the project. If Partner uses internal labor and is therefore not invoiced for labor, Partner will submit to CLEAResult a copy of the equipment invoice and an estimate of internal labor hours spent.

### **POST-INSTALLATION INSPECTION**

Once the project is completed, the Partner notifies CLEAResult. Based on the size and nature of Partner’s specific project(s), a post-installation inspection may be required. Using the most recent project documentation, a

## Program Manual

### CPS Energy Commercial Solutions Program

Program inspector will again visit the site or sites to visually verify the equipment has been replaced as indicated. The inspector will document the type of equipment installed including make, model and serial number where applicable. The Partner must provide a knowledgeable representative to accompany the inspector on the postinstallation inspection.

### **INCENTIVE PAYMENT**

Using the results of the post-installation inspection, the Program Implementer will determine the eligible demand savings (kW) and annual energy savings (kWh/yr) for the project and determine the amount of incentives due to the Partner. The Program is not under any obligation to provide Partner with more incentives than the amount reserved by the Final Project Application Form (FA) for any project, even if Partner achieves greater energy savings by the project than what were estimated. However, if budget is still available when a project achieves greater energy savings than estimated, the Program Implementer has the option to pay Partner more than the amount reserved, up to the incentive calculated by the achieved energy savings. For additional details on how incentive payments are determined, scheduled, and paid, please see the “Incentives” section in this manual.

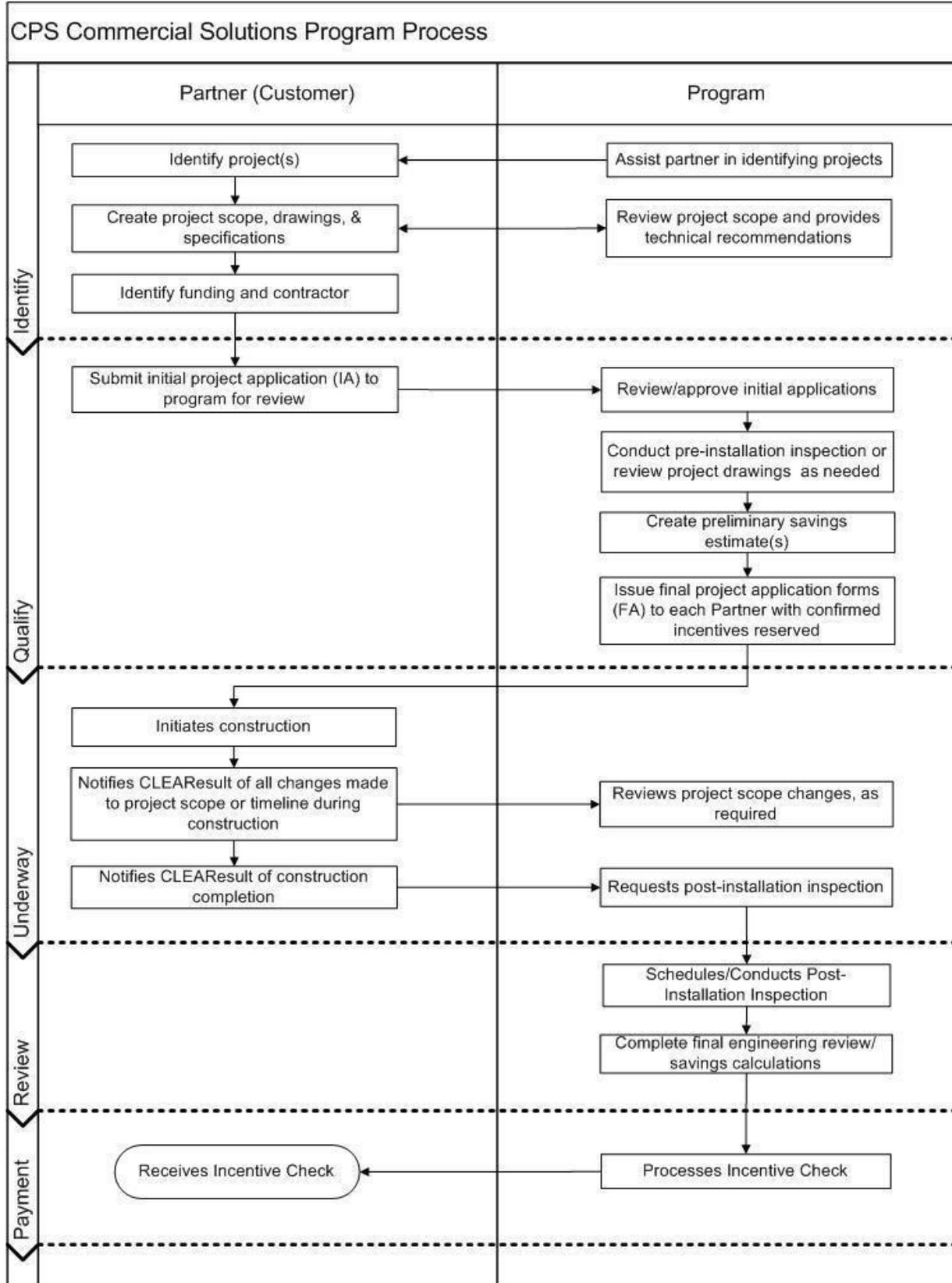
### **PROGRAM ENROLLMENT/CONTACTS**

To enroll in the Program, the Partner executes a Letter of Intent (LOI) and submits it to CLEAResult. An example of the Commercial Solutions LOI is included in the “Appendices” section of this Program Manual.

The LOI should be signed and mailed, emailed or faxed to:

CPS Energy Commercial Programs  
Attn: CLEAResult  
Address: 8918 Tesoro Dr, Suite 108  
San Antonio, TX 78217  
Email: [cpsenergycommercial@clearesult.com](mailto:cpsenergycommercial@clearesult.com)  
Fax: (210) 904-8365

**PROGRAM PROCESS DIAGRAM**



## DISCLAIMERS

### CONFIDENTIALITY

A Partner's sensitive company and project information submitted to the Program, such as financial statements and project costs, will be treated confidentially to the fullest extent possible and will not be provided directly to outside parties other than for third party program evaluation, however, neither CLEAResult nor CPS Energy will be liable to any Partner or other party as a result of public disclosure of any submittals.

### FALSE, MISLEADING OR INCORRECT INFORMATION

CLEAResult will discontinue its evaluation of all submittals from any Partner who submits false, misleading or incorrect information. If an evaluation is discontinued under these circumstances, CLEAResult will return all of the Partner's submittals.

### DISCLAIMER OF WARRANTIES

Partner acknowledges and agrees that any review or inspection by CPS Energy or CLEAResult of Partner's facilities/premises or of the design, construction, installation, operation or maintenance of the energy efficiency equipment installed or to be installed in connection with the Program is solely for the information of CPS Energy. In performing any such inspection or review or in accepting the installed equipment for the award of incentives, Partner acknowledges and agrees that CPS Energy or CLEAResult makes no guarantee, representation or warranty whatsoever as to the economic or technical feasibility, capability, safety or reliability of the equipment, its installation by a project contractor or its compatibility with Partner's facilities.

### PROGRAM IMPLEMENTER IS AN INDEPENDENT CONTRACTOR

CLEAResult is an independent contractor and is not authorized to incur obligations on behalf of CPS Energy. CPS Energy is not responsible for the truth or validity of any representation not contained in the Program Manual or Letter of Intent.

## DEFINITIONS

**Deemed Savings** – a set of pre-determined, validated estimates of energy and peak demand savings attributable to energy efficiency measures in particular types of application that an electric utility may use instead of energy and peak demand savings determined through measurement and verification activities.

**Demand Savings (kW)** – peak demand savings that have been approved using one of the eligible measurement and verification protocols as set forth in this Program Manual.

**Estimated Incentive Payment** – contained in the Project Application Form (once approved by the Program Implementer), this is the amount of incentives reserved in the Program Budget for the list of committed projects, and therefore is the maximum amount of incentives the Partner can receive upon project completion and verification of savings.

**Incentive Reservation** – see "Incentive Reservation/Payment" section.

**Letter of Intent** – non-binding agreement signed and submitted by Partner, stating their intent to participate in the Program.

## Program Manual

### CPS Energy Commercial Solutions Program

**Peak demand** – electrical demand at the times of highest annual demand on the utility’s system.

**Peak demand reduction** – reduction in demand on the utility system throughout the utility system’s peak period.

**Post-Installation Inspection** – inspection performed after installation of new equipment. Post installation inspection verifies actual installed measure(s) to verify resulting deemed or measured and verified demand and energy savings.

**Pre-Installation Inspection** – inspection performed prior to any replacement of existing equipment, device, or structural energy efficiency measures (windows, window film, roof coatings, etc.). to validate and collect data on existing equipment and measures.

**Project Application Form** – in order to reserve financial incentives through the Program, Partner must complete and sign this document, which details the location, scope, and start/completion dates for each project that is being submitted.

**Summer Peak period** –the summer peak period consists of the hours from one p.m. to seven p.m., during the months of June, July, August, and September, excluding weekends and Federal holidays.

**Winter Peak period** –the winter period consists of the hours from six p.m. to ten p.m., and six a.m. to ten a.m. during the months of December, January, and February, excluding weekends and Federal holidays.

## FREQUENTLY ASKED QUESTIONS (FAQS)

### 1. What is the Commercial Solutions Program?

Commercial Solutions is an energy efficiency program designed to assist CPS Energy commercial partners to reduce peak electric demand and annual energy usage by providing access to technical knowledge, energy assessments, and financial incentives to improve the efficiency of their buildings.

### 2. Who is eligible to participate in the Program?

Please see the “Program Eligibility” section of this Program Manual for exact details. In general, the Program is offered to commercial customers that own/operate facilities within the CPS Energy electric service territory.

### 3. What does the Program cost?

Partners, PAY NOTHING for participating in the Program. CPS Energy provides all of the support and incentives for the Program. THE FINANCIAL INVESTMENT ANY PARTNER MAKES IS FOR THE ENERGY EFFICIENCY MEASURES THEY INSTALL IN THEIR FACILITIES.

### 4. What incentives are available through the Program?

The Program offers both cash and non-cash incentives to Partners in order to assist with a specific organization’s needs. Financial incentives may be available for energy efficiency projects, depending on the budget available at the time of your Project Application Form submission. Other program

## Program Manual

### CPS Energy Commercial Solutions Program

services, such as technical assistance and communications support, are made available according to the needs of each Partner.

#### **5. How does a customer enroll in the Program?**

An eligible customer may participate in the Program by submitting a Letter of Intent to the Program Implementer. Please see the “Program Enrollment/Contacts” section for additional details. Also, the program LOI is included in the “Appendices” section. Participation in the Program will continue automatically from year to year once you have enrolled in the program.

#### **6. What are the next steps after initial enrollment in the Program?**

- a) Program Implementer (CLEAResult) will contact Partner to discuss what, if any, technical assistance is needed to identify energy efficiency projects.
- b) CLEAResult and the Partner work collaboratively to appropriately characterize potential energy efficiency projects, including estimated electric demand (kW) and energy savings (kWh).
- c) Partner selects projects for the current program year and works with CLEAResult to prepare an Initial Project Application Form (IA) detailing the scope and timeline of each individual project.
- d) For projects retrofitting or replacing existing equipment, CLEAResult will conduct a preinstallation inspection at the project site prior to the Partner submitting the Initial Project Application Form (IA). The pre-installation inspection is REQUIRED for ALL retrofit projects. New construction projects do not require a pre-installation inspection.
- e) CLEAResult reviews Project Application Form(s) for accuracy and reserves incentives according to estimated reductions in peak electric demand (kW). This is the Final Project Application Form (FA).
- f) The Partner completes the energy efficiency project.
- g) The Partner notifies CLEAResult that the project is completed.
- h) For a sample of projects, CLEAResult will conduct a post-installation inspection at the project site.
- i) CLEAResult communicates final project savings/incentive amounts with the Partner via a Project Completion Report.
- j) CLEAResult follows up with the customer regarding future energy efficiency projects.

#### **7. Who decides what energy efficiency technologies to install and who installs them?**

The participants decide what energy efficiency measures to implement and how they are implemented. The Program Implementer offers only improved access to assistance for identification and evaluation of energy efficiency opportunities. The Program Implementer does NOT provide any installation of energy efficiency measures.

#### **8. How are energy efficiency opportunities determined?**

The Program works with each Partner to assess energy efficiency opportunities in both existing facilities and with new construction projects using a combination of facility walkthrus, energy performance benchmarking analysis, and staff interviews.

Program Manual  
CPS Energy Commercial Solutions Program

**APPENDICES**

- Letter of Intent (LOI)
- Project Application Form