

*A unit of American Electric Power*

# SCORE Program Manual

2019

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## PROGRAM OVERVIEW

### PROGRAM GOALS

The SCORE Program will set out to achieve set goals for both peak demand (kW) and annual energy savings (kWh), within a set Program incentive budget. The Program's goals and incentives are listed in the following table.

kW	kWh	Cash Incentives
490	2,212,886	\$122,500.00

### Background

The SWEPCO SCORE Program was developed in 2007 to comply with State of Texas energy efficiency goals to reduce peak electric demand. In 1999, the state legislature passed Senate Bill 7 (SB 7), which restructured the state's electric utility industry and set initial energy efficiency goals for investor-owned utilities. In 2007, House Bill 3693 (HB 3693) was passed and expanded these energy efficiency goals.

The SWEPCO SCORE Program is now in its 10th year and is currently in a full program phase. **The Program and all associated services are available to participants at NO COST.**

### Program Objectives

The SCORE Program is a market transformation program offered to all K-12 and higher education electric distribution customers of SWEPCO.

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, SCORE 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 benchmarking of current energy use, creation of an energy master plan, identification and evaluation of opportunities for energy efficiency measures, and communications support. SCORE works with Partners 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 SCORE Program, in addition to SWEPCO electric distribution customers (Partners), involves the Program Administrator (SWEPCO) and the Program Implementer (CLEAResult). The roles and

responsibilities of each are defined in the “Program Roles & Responsibilities” section below.

**Notes**

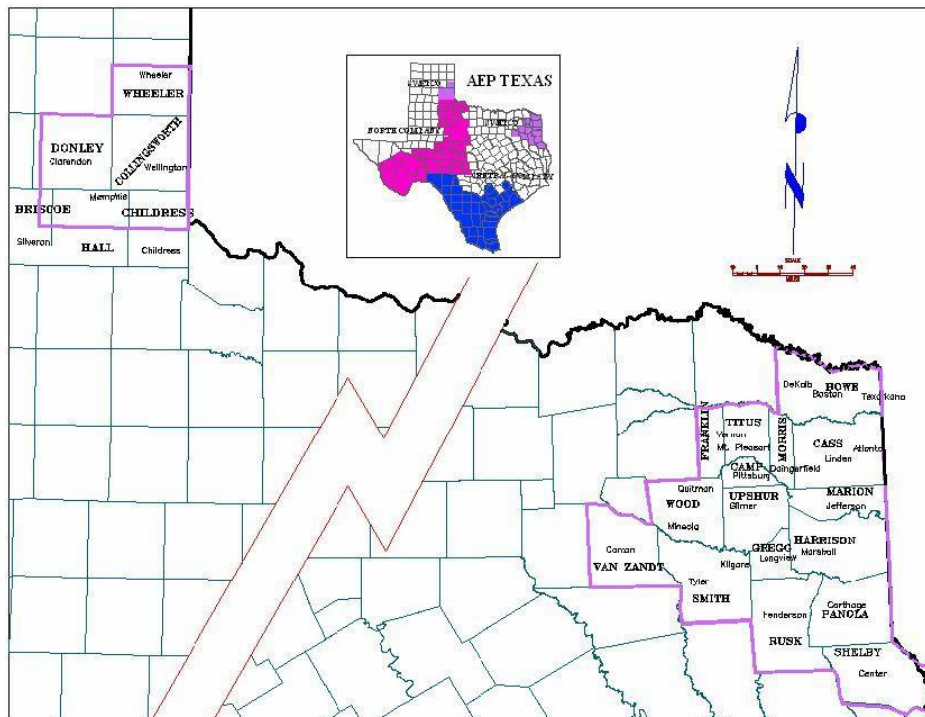
SWEPCO will not directly market any energy efficiency-related products or services to its customers. Entering into an agreement with SWEPCO does not imply SWEPCO’s endorsement or approval of any products or services. SWEPCO makes no representation of the benefits of any particular technology or energy efficiency measure eligible for incentives under this program. The selection of an energy efficiency measure is at the discretion of the individual customer.

## PROGRAM ELIGIBILITY

For the purposes of this program, an eligible “Customer” is defined by a single Tax ID number and includes any K-12 schools, colleges, or universities served by SWEPCO Texas.

The map below shows the SWEPCO service areas in Texas outlined in pink. This map is provided for reference only, as Customers located within this service territory may or may not receive electric service from SWEPCO. Multiple locations of one organization are considered a single Participant, regardless of how many SWEPCO Texas account numbers they may have.

For a project at a specific facility to be eligible for financial incentives in the program, the ESI ID (noted on the electric bill as shown below) must be provided in order to verify SWEPCO Texas provides electric service for the facility.



SWEPCO Texas ESI ID:  
 101769896    01234567

Company Code    Premise ID#

To participate in the 2019 SCORE Program, please see the “Program Enrollment/Contacts” section at the end of this manual.

## PROGRAM ROLES & RESPONSIBILITIES

### Program Administrator

SWEPCO is responsible for:

- Authorizing and issuing incentive payments for completed projects, and
- Overseeing the Program Implementer.

### Program Implementer

CLEAResult was selected by SWEPCO to serve as the Program Implementer for the 2019 SCORE Program. CLEAResult is responsible for:

- Conducting outreach to potential Program Partners,
- Approving Program Partners eligibility and enrollment,
- Providing some or all of the following services, based on the specific Partner's needs, as assessed by SWEPCO and CLEAResult: education, training, energy performance benchmarking, energy master planning, technical assistance, and Public Relations/communications support,
- Reviewing and approving Project Application Forms,
- 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.

### Program Partner

To participate in the SWEPCO SCORE 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 SCORE Memorandum of Understanding (MOU) (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 November 15<sup>th</sup> of the program year
- Notify CLEAResult when projects are completed
- Provide access to project facilities and ample lead time both before and after project completion for inspection of the baseline and post-retrofit condition.

### Notes

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

## PROGRAM OUTREACH & MARKETING

The Program will use the following marketing and outreach strategies to engage and enroll customers.

**Upstream Outreach** – Work directly with installers, distributors and trade associations to educate them on the program and develop a robust network of service providers that will implement energy savings measures for customers and deliver savings to the commercial programs. The Program will also cross-reference installers and distributors who are part of the SCORE<sup>SM</sup> Program.

**Downstream Outreach** – Work with SWEPCO Texas' Key Account Managers and public affairs personnel to recruit or re-enroll commercial customers. The Program will also leverage existing relationships to explore opportunities with key major market sectors. The Program will schedule and conduct phone and face-to-face meetings with these customers.

**Program Website** – The Program will host and maintain a program website with content specific to the commercial market segment to help customers relate to and identify opportunities targeted to their specific business type.

**Program Quarterly Newsletter** – The Program will develop and distribute quarterly newsletter to past and present program participants, including market actors such as contractors, energy service providers, and architects and engineers.

**Trade Shows and Conventions** – The Program will look for opportunities to represent the program at state and regional conferences to educate contractors, building, and business owners further about the Commercial Solutions Program.

## 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 non-cash 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.

Because this program offers both cash and non-cash incentives, Partners who enroll in the SCORE program agree to utilize the cash incentives provided in SCORE, as opposed to those offered in the other energy efficiency programs offered by SWEPCO.

### Non-Cash Incentives

**TECHNICAL ASSISTANCE & PROJECT IDENTIFICATION** – SCORE 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, SCORE also educates senior decision makers on project financing options where funding sources are not immediately available.

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

**ENERGY PERFORMANCE BENCHMARKING** – SCORE benchmarks current energy use with the U.S. EPA's ENERGY STAR® Portfolio Manager® tool. Portfolio Manager provides a rating for the performance of buildings on a scale of 1 to 100, relative to similar buildings, with higher scores indicating better energy performance. Other benchmarking metrics are also provided that compare the Partner's facilities to similar facilities within the region, such as cost per student/employee, cost per square foot, etc.



ENERGY MASTER PLANNING – SCORE provides Partners with training and guidance for developing an Energy Master Plan (EMP). EMPs can overcome entrenched institutional barriers to energy efficiency by replacing policies and procedures with ones that promote energy efficiency (e.g., specifying minimum levels of energy performance) and eliminate counterproductive practices (e.g., installing low-first-cost systems).

### **Cash Incentives**

SCORE provides financial incentives, based on reductions in peak electric demand (kW) at a Partner's facility. These incentives help the Partner to "buy down" the 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: Lighting \$250 per peak kW reduced, \$215 per kW non-LED, HVAC \$250 per peak kW reduced,**

### **INCENTIVE BASIS**

Financial incentives received through the Program will be based on a project's reductions in peak electric demand (kW) and energy consumption (kWh/yr) as determined pursuant to this Program Manual and the Texas Resource Manual (TRM). The Public Utility Commission of Texas (PUCT) has hired a third-party company to conduct Evaluation, Measurement and Verification for all utility programs. The new TRM compiles all of the PUCT-approved deemed savings into one document for easy reference. Demand and energy savings will be calculated using the definitions provided above and according to one of three Measurement & Verification (M&V) approaches.

1. **Deemed or Stipulated Savings:** The most common approach, deemed savings is based on 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. The Partner is not required to perform any M&V activities when using deemed or stipulated savings. For example, projects that replace DX units or T8 lamps and ballasts with new, high performance alternatives would typically be eligible for deemed savings and would not require further field measurements.
2. **Simplified Measurement and Verification (Simple M&V):** Savings values using this approach are based on simple engineering calculations using typical equipment characteristics and operating schedules developed for particular applications, with some short-term testing or simple metering. Please contact CLEAResult 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.
3. **Measured Savings or Full M&V:** With this approach, actual measurements and analysis through metering, billing or regression analysis, or energy modeling are relied upon to calculate peak electric demand savings and energy savings. There are specific M&V procedures based on the International Performance Measurement and Verification Protocol (IPMVP). This Protocol serves as the starting point for standard industry practice and specifies how and what M&V procedures are to be used in calculating demand and energy savings. More information about the IPMVP may be found at [www.evo-world.org](http://www.evo-world.org). Partners selecting this option must submit an M&V plan with their Project Application. Proposed M&V plans must then be approved by CLEAResult before any associated measures are installed. Please contact CLEAResult 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.

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 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). M&V activities/responsibilities may be assigned to a third-party not required for participating in the Program but may be justified for specific projects.

## **INCENTIVE RESERVATION**

Cash incentives are subject to availability and reservation. In order to receive cash incentives from SCORE, Partner must first reserve incentives by completing and submitting a Project Application Form detailing the scope and timeline for each individual SCORE project and providing the Program Implementer with all necessary supporting documentation (please see “Project Requirements” section below for “Project Definition & Requirements”). CLEAResult will review submitted Project Application Forms and approve eligible projects for an initial incentive reservation. The incentive reservation amount may be adjusted during the course of the program year, according to changes in the estimated savings. CLEAResult may choose to update the Partner on significant changes to the incentives reserved amount for their projects. SWEPCO 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. You can choose to participate in the Electronic Fund Transfer (EFT), and your incentive payment will be deposited in your account. 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 SCORE are limited. In the event that incentive reservations exceed the program budget for incentives, the program is considered fully or over-subscribed. Project Applications that are submitted to SCORE 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 peak demand savings measure type at one (1) facility owned and/or operated by the Partner.

All measures must meet the following requirements:

- Must result in a measurable and verifiable electric demand reduction during the summer peak period, defined as between 1 PM and 7 PM, Monday through Friday, for the months of June through September, excluding federal holidays.
- Produces a measurable and verifiable electric demand reduction during the peak summer period (defined as weekdays, between the hours of 1 p.m. and 7 p.m. from June through September, excluding holidays) or the peak winter period (defined as weekdays, between the hours of 6 p.m. and 10 p.m. and 6 a.m. and 10 a.m. from December through February, excluding holidays) and produces electric energy savings
- Must produce electric demand savings through an increase in energy efficiency.
- Full incentives are based on measures that have a useful life of at least 10 years. Equipment with shorter measure lives may receive a pro-rated incentive amount but require documentation of their useful life.
- New equipment must exceed minimum equipment efficiency standards (see discussion on “Efficiency Standards,” below).

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 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 generally measurable by deemed savings calculations and are eligible in the SCORE 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.

### **LIGHTING EFFICIENCY**

- Lamp and Ballast Replacements
- HID Fixture Replacements
- LED Lighting
- Exterior Lighting

### **UNITARY AIR CONDITIONING AND HEAT PUMP EQUIPMENT**

- Air Conditioners—Air Cooled
- Air Conditioners—Water and Evaporative Cooled
- Heat Pumps—Air Cooled

### **WATER CHILLING EQUIPMENT (CHILLERS)**

- Screw—Air Cooled
- Reciprocating—Air Cooled
- Reciprocating—Water Cooled
- Rotary/Screw/Scroll—Water Cooled
- Centrifugal—Water Cooled

### **BUILDING ENVELOPE (RETROFIT/REPLACEMENT PROJECTS ONLY)**

- Roofing
- Windows

## **REFRIGERATION**

- Solid & Glass Door Reach-Ins
- Entrance and exit door refrigeration
- Door Gaskets for walk-in and Reach-in coolers & freezers

### **Electronic Defrost Controls**

- ECM Evaporator Fan Motors
- Evaporator Fan Controls
- Cooler Night Covers
- Strip Curtains
- Zero-Energy Doors
- Door Heater Controls

## **FOOD SERVICE MEASURES**

- Electric Convection Ovens
- Electric Combination Ovens
- Energy Star® Dishwashers
- Energy Star® Steam Cookers
- Energy Star® Fryers
- Energy Star® Hot Food Cabinets
- Vending Machine Controls
- Pre-Rinse Spray Valves

## **LIGHTING & HVAC CONTROLS**

- VFDs on Air Handlers
- Lighting Demand EAFs
- Occupancy Controls (Lighting & HVAC)
- Rotary/screw/scroll – water cooled
- Centrifugal – water cooled

## **PREMIUM EFFICIENCY MOTORS**

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

## **PROGRAM SOFTWARE AND SAVINGS CALCULATORS**

The SCORE Program does not require any specific software to participate. The Program will utilize and make available approved savings calculators to program participants and will assist with the completion of these calculators.

## **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
- Project Application Submission
- Project Application Review & Incentive Reservation
- Project Installation
- Project Completion Notice
- Post-Installation Inspection
- 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**, Partners allow the Program Implementer access to the project site for the purpose of a pre-installation 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 pre-installation 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 CLEAResult for review. These drawings are the supporting documentation for new construction projects.

## **Project Application Submission**

Once a pre-installation inspection (retrofit projects) or plan review (new construction projects) has been completed, CLEAResult will assist the Partner in submitting a Project Application Form. 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 can be submitted by mail, email or fax.

SWEPCO SCORE Project Applications  
Attn: George LePoris  
4228 North Central Expressway-Suite 350  
Dallas, TX 75206  
[George.LePoris@CLEAResult.com](mailto:George.LePoris@CLEAResult.com)  
Fax: (972) 894-1566

## **Project Application Review & Incentive Reservation**

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

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). Once reviewed and approved, CLEAResult will notify the Partner in writing of the incentive amount reserved in the Program.

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
- 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 for approval by the date the new submission is received.

### **Waitlist**

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.

### **Project Installation**

Upon completion and written approval of the pre-installation inspection, the Partner proceeds with the project installation. In the case of a new construction project, Partner may proceed directly to installation as soon as the project is identified (i.e. Partner may choose to begin construction before the Project Application Form is submitted). Partner must notify the Program Implementer immediately of any and all changes to the project scope, equipment selection, or timeline during installation.

### **Project Completion Date**

Project Application Forms are approved under the condition that project installations will be **completed by November 15th** in the program year of the submitted Form. Project installations not completed by November 15th of the program year of the submitted Project Application Form risk forfeiting, at the sole discretion of the Program Implementer, the incentive funds that have been reserved for that project.

### **Verification Notice**

By **no later than July 31** of the program year, Partners with approved Project Application Forms must verify, in writing to CLEAResult, that they will complete their project installations by November 16 in the current funding year. Partners that fail to meet this notice requirement risk forfeiting, at the sole discretion of the Program Implementer, the incentive funds that have been reserved for that project.

### **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 CLEARResult.

Partner agrees to submit to CLEARResult 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 CLEARResult a copy of the equipment invoice and an estimate of internal labor hours spent.

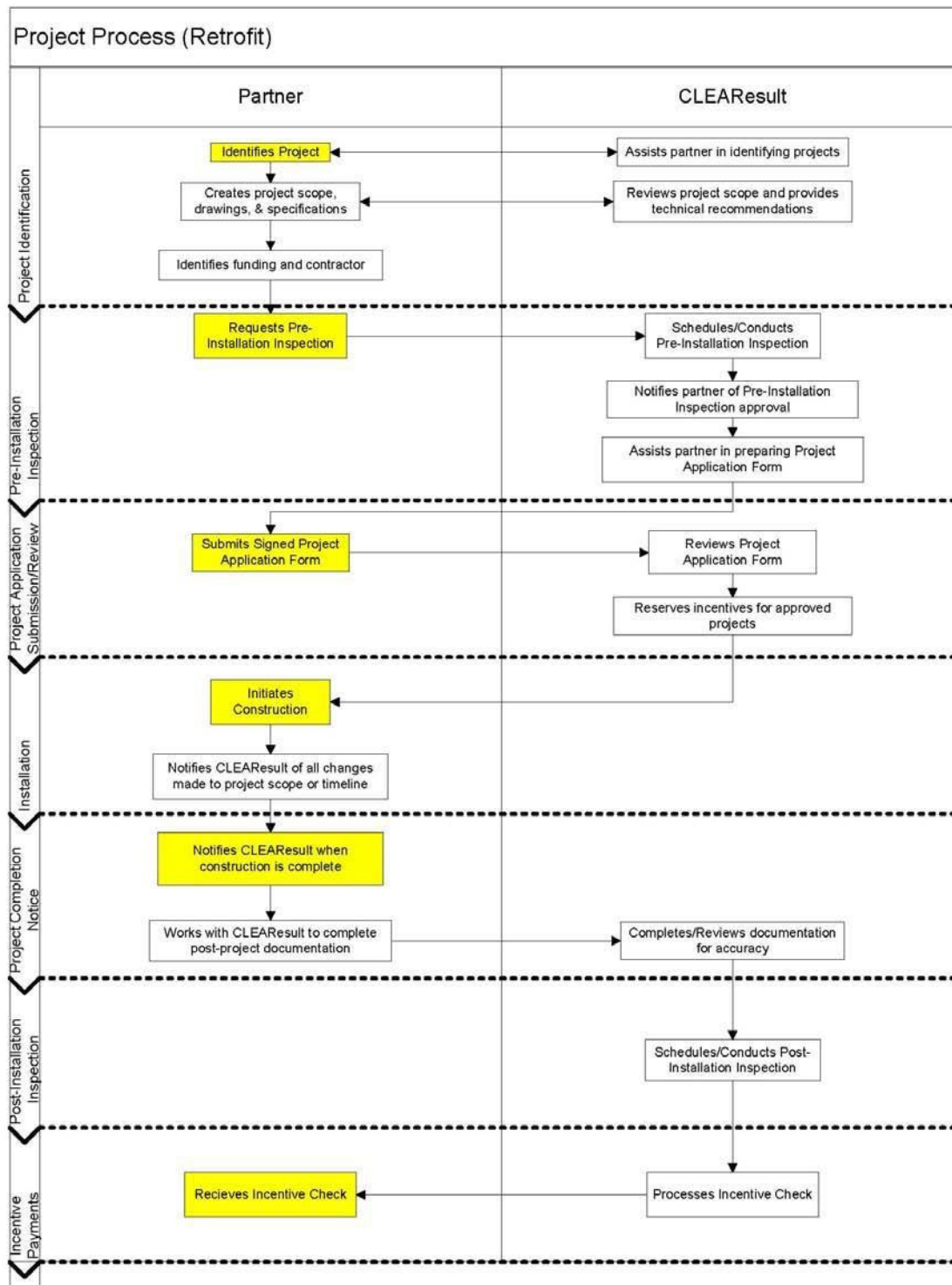
### **Post-Installation Inspection**

Once the project is completed, the Partner notifies CLEARResult and schedules a post-installation inspection. Using the most current project documentation, a 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 post-installation inspection.

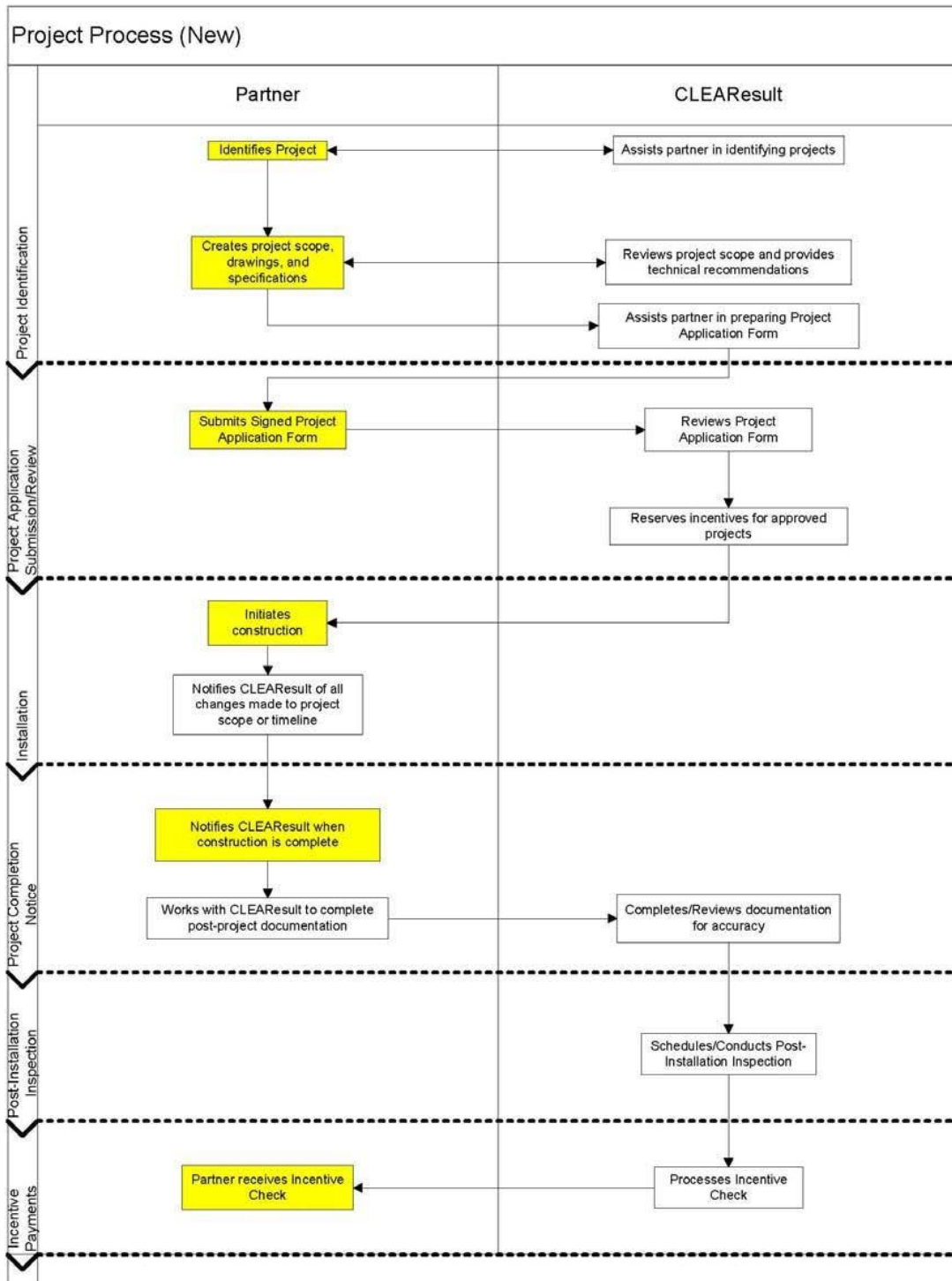
### **Incentive Payment**

Using the results of the post-installation inspection, the Program Implementer will determine the eligible peak demand savings (kW) and annual energy savings (kWh/yr) for the project and determine the amount of incentives due to the Partner. The Program Implementer is not under any obligation to provide Partner with more incentives than the amount reserved by the Project Application Form 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.

## Workflow- Retrofit Projects



# Workflow- New Construction Projects



## PAYMENT PROCESS

The Program Implementer is responsible for validating and finalizing all demand and energy savings and the corresponding cash incentives. The Implementer will submit Incentive Check Requests to the Program Administrator monthly for payment to the participating Partner. The Program Administrator will process the Incentive Check Request and issue payment to the Partner. **NOTE: Electronic Deposit is available to expedite payment.**

The following documentation is required to issue an incentive payment:

- Signed Memorandum of Understanding
- Signed W9
- SWEPCO Texas ESI ID number and Meter Number for each location with qualifying projects
- All required supporting documentation as listed in the TRM for each submitted measure
- Materials invoice with cost

## PROGRAM DATA TRACKING & REPORTING

The SCORE Program track all data within the Implementer's proprietary database and will make that data available to the Program Administrator. The Program will provide regular reporting to the Program Administrator, including but not limited to monthly progress reports and annual reports.

## PROGRAM ENROLLMENT/CONTACTS

To enroll in the Program, the Partner executes a Memorandum of Understanding (MOU) and submits it to CLEARResult. An example of the SCORE MOU is included in the "Appendices" section of this Program Manual. If an organization has participated in SCORE previously, participation is continued automatically from year-to-year. CLEARResult will issue an MOU Addendum to existing Partners at the beginning of each year if there are any significant changes to the terms of the agreement.

The MOU can be submitted by mail, email or fax.

SWEPCO Commercial Solutions Project Applications  
Attn: George LePoris  
4228 North Central Expressway-Suite 350  
Dallas, TX 75206  
[George.LePoris@CLEARResult.com](mailto:George.LePoris@CLEARResult.com)  
Fax: (972) 894-1566

For additional information about the program, please contact one of the following SCORE representatives:

Mike Nix  
EE/DR Coordinator  
SWEPCO  
3708 W. 7<sup>th</sup> street  
Texarkana, TX 75501  
(903) 223-5792  
[MNix@aep.com](mailto:MNix@aep.com)

SWEPCO Team  
CLEARResult  
4228 North Central Expressway-Suite 350  
Dallas, TX 75206  
(214) 302-8130  
[George.LePoris@CLEARResult.com](mailto:George.LePoris@CLEARResult.com)

## DISCLAIMERS

### Confidentiality

The Program is subject to oversight by the Public Utility Commission of Texas (PUCT), which may request a copy of any Program materials received by CLEAResult or SWEPCO. 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 the PUCT. Neither CLEAResult nor SWEPCO 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.

### Formal Complaints

Please contact CLEAResult to raise any issues/concerns that have arisen during participation in the Program:

Chris Pasch  
CLEAResult, Sr. Program Manager  
4301 Westbank Drive  
Building A, Suite 300  
Austin, TX 78746  
[Chris.Pasch@CLEAResult.com](mailto:Chris.Pasch@CLEAResult.com)

Also, a formal complaint may be submitted to the PUCT at any time by using the following address and contact information:

Public Utility Commission of Texas  
Office of Customer Protection  
P.O. Box 13326  
Austin, TX 78711-3326  
phone: (512) 936-7120, or in Texas (toll-free) 1-888-782-8477  
fax: (512) 936-7003  
E-mail: [customer@puc.state.tx.us](mailto:customer@puc.state.tx.us)  
internet address: [www.puc.state.tx.us](http://www.puc.state.tx.us)  
TTY (512)936-7136  
Relay Texas (toll-free) 1-800-735-2989

### Disclaimer of Warranties

Partner acknowledges and agrees that any review or inspection by SWEPCO 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 SWEPCO. In performing any such inspection or review or in accepting the installed equipment for the award of incentives, Partner acknowledges and agrees that SWEPCO 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 SWEPCO. SWEPCO is not responsible for the truth or validity of any representation not contained in the Program Manual or Memorandum of Understanding.

## 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.

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

**Peak period** – For the purpose of this section, the 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.

**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 SCORE, Partner must complete and sign this document, which details the location, scope, and start/completion dates for each project that is being submitted.

## FREQUENTLY ASKED QUESTIONS (FAQS)

### 1. What is the SCORE Program?

SCORE is an energy efficiency program designed to assist SWEPCO's school customers 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 SCORE?

Please see the "Program Eligibility" section of this Program Manual for exact details. In general, SCORE is offered to all SWEPCO K-12 schools, colleges, and universities.

### 3. What does the Program cost?

Partners PAY NOTHING for participating in the SCORE Program. SWEPCO 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 SCORE 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 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 Memorandum of Understanding to the Program Implementer. Please see the "Program Enrollment/Contacts" section for additional details. Also, a sample MOU is included in the "Appendices" section.

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

Program Implementer (CLEAResult) will contact Partner to discuss what, if any, technical assistance is needed to identify energy efficiency projects.

- a) CLEAResult and the Partner work collaboratively to appropriately characterize potential energy efficiency projects, including estimated electric demand (kW) and energy savings (kWh).
- b) Partner selects projects for the current program year and works with CLEAResult to prepare a Project Application Form detailing the scope and timeline of each individual project.
- c) For projects retrofitting or replacing existing equipment, CLEAResult will conduct a pre-installation inspection at the project site prior to the Partner submitting the Project Application Form. The pre-installation inspection is REQUIRED for ALL retrofit projects. New construction projects do not require a pre-installation inspection.
- d) Assuming the Partner passes any requisite pre-installation inspections, Partner then submits a completed/signed Project Application Form to the Program Implementer.
- e) CLEAResult reviews Project Application Form(s) for accuracy and reserves incentives according to estimated reductions in peak electric demand (kW).
- f) The Partner completes the energy efficiency project.
- g) The Partner notifies CLEAResult that the project is completed. Please note that all projects that are to receive a financial incentive from the 2018 SCORE Program must be completed by November 30, 2018 in order to allow time for verification of the project.
- h) For all 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?**

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