



Nonprofit Facility Matching Grant Program 2010 Application and Guidelines

Program Overview

Oncor's Nonprofit Facility Matching Grant Program (the "Program") is designed to assist nonprofit organizations with improving the energy efficiency of their facilities. A total of \$2.1 million in matching grant funding will be made available to nonprofit organizations through 2012 for the installation of energy efficiency and/or renewable energy upgrades inside the Oncor service area. Funds will be distributed to approved, completed projects that meet the Program's requirements on a first come, first served basis. This document outlines the eligibility requirements for an organization to be considered for a matching grant allowance, the application, the guidelines, and the award process. All nonprofit organizations that meet the eligibility requirements and are interested in improving the energy efficiency of their facilities are encouraged to apply.

Program Background

Oncor Electric Delivery Company LLC ("Oncor") is a regulated electricity transmission and distribution company that provides the essential service of delivering electricity safely, reliably and economically to end-use consumers through its distribution systems, as well as providing transmission grid connections to merchant generation plants and interconnections to other transmission grids in Texas. Oncor operated the largest distribution and transmission in Texas, delivering electricity to approximately three million homes and businesses and operating more than 117,000 miles of transmission and distribution lines.

Each year Oncor manages a fleet of energy efficiency programs that impact homeowners, government facilities, and businesses across Oncor's service area. These programs are designed to offer incentives that help offset the cost of installing energy-efficient upgrades or making upgrades and improvements to a facility to increase its overall energy efficiency.

The Nonprofit Facility Matching Grant Program is provided by Oncor as part of its commitment to reduce energy consumption and demand. For more information regarding Oncor and its other energy efficiency programs visit www.takealoadofftexas.com.

Contact Information

Oncor's Nonprofit Facility Matching Grant Program
Attn: Carmen Miestchovich, Program Manager
1601 Bryan St., Suite 21-090D
Dallas, TX 75207
Phone: 214-486-4625
Fax: 214-486-7300
E-mail: cmiestc1@oncor.com

Program Eligibility Requirements

Nonprofit organizations with facilities and projects that meet the minimum requirements outlined below are encouraged to apply for consideration of matching grant funds. Please contact the Oncor Program Manager with questions regarding requirements or eligibility.

Nonprofit Organization Eligibility Requirements

Organizations must meet the following requirements in order to be eligible for consideration of a matching grant:

- Meet the IRS guidelines for 501(c) (3) tax exemption status.
- Be organized and operated exclusively for educational, scientific, and other charitable purposes, except religious purposes. 501 (c) (3) organizations that are organized and operated exclusively for religious or faith-based purposes should refer to the Program Manual and Program Guidelines for the Oncor 2010 Worship Facility Matching Grant Program.

Facility Eligibility Requirements

Only nonprofit facilities that meet the following eligibility requirements will be considered for matching grant funds:

- Receive service from Oncor as evidenced by the Electric Service Identifier (ESI ID) number on the organization's electric bill. The ESI ID number is a 17-digit number. If the third through seventh digits are "44372" or "17699," then this account is serviced by Oncor. Example: 10 44372 000 1234567.
- Be owned by the nonprofit organization that submits the application (the "Applicant") or, if the facility is leased or donated, the electricity invoice must be the sole responsibility of the Applicant.

Project Eligibility Requirements

A project is defined as a set of proposed energy efficiency and/or renewable energy generation upgrades at an eligible facility. For a list of eligible upgrades, see Appendix A: Nonprofit Facility Matching Grant Program Eligible Upgrades chart.

Below are the criteria that upgrades in an eligible facility must meet in order to be considered for grant funding:

- Produce savings through an increase in energy efficiency.
- Produce a measureable and verifiable electric demand reduction during the peak summer period or must reduce energy consumption.
- Be installed in a retrofit application.
- Exceed minimum equipment standards.
- Exceed minimum state and local building standards.

Upgrades or projects not listed on the Nonprofit Facility Matching Grant Program Eligible Upgrades chart included herein as Appendix A will be evaluated on a case-by-case basis.

Program Structure and Guidelines

A facility is defined to be a single building and any directly connected buildings. A nonprofit organization may apply for multiple matching grants during a year for energy efficiency and/or renewable energy generation upgrade(s) for different facilities.

- Only one (1) matching grant will be awarded per facility per year, up to 50% of the total project cost, but not to exceed \$100,000.
- A matching grant can only be used to pay for the direct purchase and installation of the approved energy efficiency and/or renewable generation upgrade(s).
- The matching grant will be issued to the Applicant only after receipt of the completed post-retrofit Project Savings File(s) and verification of the installation of the energy efficiency and/or renewable generation upgrade(s) conducted by Oncor.
- The final matching grant amount paid to the Applicant will be calculated based on the verified kW and kWh savings of the energy efficiency upgrade(s) installed at the facility. The kW and kWh savings will be verified by reviewing support documents submitted at project completion and by site inspections conducted by Oncor.

Additional Funds Requirement

The matching grant amount is designed to cover **up to one-half** of the energy efficiency costs incurred by an Applicant to purchase and install an approved, completed project's energy efficiency upgrade(s). **The outstanding balance to fund completion of each project will need to be secured by the Applicant from sources other than the Program or Oncor and outlined in the application as additional funds.**

Facility Classifications, Facility Pre-Assessments and Commercial Energy Audits

Typically, applicant facilities will be classified "small commercial" or "commercial" properties. To determine the facility classification, the Applicant will need to collect the last twelve (12) months of electric bills and complete the Electricity Usage Worksheet. This document is in Appendix B.

Small Commercial

Applicants that are classified as small commercial are encouraged to contact a Service Provider to schedule a Facility Pre-Assessment. The Facility Pre-Assessment will provide a list of the recommended energy efficiency and/or renewable generation upgrade(s) specific to the facility. The pre-retrofit portions of the Project Savings File(s) completed by the Service Provider are used to complete the Facility Pre-Assessment. The calculated kW and kWh savings from these file(s) are then used to complete the Application. Oncor will also use the same Project Savings File(s) to verify the allowable matching grant request amount. If assistance is needed, contact the Service Provider or the Oncor Program Manager.

Commercial

Applicants that are classified as commercial are encouraged to participate in Oncor's Commercial Energy Audit Program before contacting a Service Provider. To participate in a full energy audit the Applicant will need to apply for the Commercial Energy Audit Program. Please visit www.takealoadofftexas.com for more details and the Application for this Program. Once the energy audit is completed, the Applicant should then select its Service Provider of choice. The Service Provider will then use the energy audit report to complete the Project Savings File(s) specific to the applicant facility. The energy audit report will help guide the applicant and the Service Provider to select the energy efficiency measure(s) best suited to the needs of the Applicant. The Service Provider will then complete the pre-retrofit portions in the Project Savings File(s). The calculated kW and kWh savings from these file(s) are then used to complete the Application. Oncor will also use the same Project Savings File(s) to verify the

allowable matching grant request amount. If assistance is needed, contact the Service Provider or Oncor Program Manager.

Supporting Documentation Requirements

The following support documentation must be submitted along with the completed 2010 Nonprofit Facility Matching Grant Application. Applications submitted without all of the appropriate support documentation will not be reviewed by the Oncor Grant Review Committee.

- Proof of IRS 501(c)(3) status (i.e., I-990 or Determination Letter of Ruling);
- Completed pre-retrofit portions of Project Savings File(s) for each measure including photos;
- Signed project bid or quote from the Service Provider for energy efficiency and/or renewable energy upgrade(s) including itemized cost for equipment, installation, and equipment specifications; and/or,
- For commercial classified facilities include the Commercial Energy Audit Report.

Matching Grant Application Process

The 2010 Nonprofit Facility Matching Grant Application process is outlined in Appendix C: Nonprofit Facility Matching Grant Program Checklist. The checklist contains defined task owners and detailed grant tasks. The checklist is designed to assist the Applicant in managing the timeline of the proposed project. If assistance is needed, contact the Oncor Program Manager.

Forfeit of Matching Grant

Applicants may forfeit their rights to all or part of the grant allowance outlined in the official Matching Grant Notification Letter if Oncor is unable to verify that the facility and upgrade(s) meet the eligibility requirements outlined in this document or, if the upgrade(s) do not conform to the specifications previously approved by Oncor for the project.

Matching Grant Application Submission

2010 Nonprofit Facility Matching Grant Applications will be accepted on an ongoing basis. Applicants should submit one (1) copy of the Application along with all required supporting documents to the following address:

Oncor's Nonprofit Facility Matching Grant Program
Attn: Carmen Miestchovich, Program Manager
1601 Bryan St., Suite 21-090D
Dallas, TX 75201

Matching Grant Award Schedule

Matching grants will be awarded on a monthly basis during the program year or until funds are no longer available. Completed 2010 Nonprofit Facility Matching Grant Applications must be received at least fifteen (15) business days prior to a scheduled Oncor Grant Review Committee meeting. The meetings are generally scheduled during the fourth week of each month.

Applications received after the fifteen (15) business day timeframe will automatically be placed into the next grant cycle for consideration. The Oncor Program Manager will contact each Applicant with timelines specific to the submitted Application.

Matching Grant Evaluation Criteria

Only completed Applications that meet the submission requirements outlined in this document will be reviewed by Oncor for consideration of matching grant funding.

Oncor reserves the right to make final matching grant awards based on the proposed projects that are most likely to achieve the goals and intent of the Nonprofit Facility Matching Grant Program. All awards are subject to successful project completion and verification. Oncor reserves the right to decrease a matching grant allowance if a project does not demonstrate projected savings.

Questions

Contact Carmen Miestchovich at cmiestc1@oncor.com or contact her by phone at 214-486-4625 with any questions regarding the Program.

Attachments

[2010 Nonprofit Facility Matching Grant Application](#)

Appendix A: Nonprofit Facility Matching Grant Program Eligible Upgrades

Appendix B: Electricity Usage Worksheet

Appendix C: Nonprofit Facility Matching Grant Program Checklist

2010 Nonprofit Facility Matching Grant Application

Oncor's Nonprofit Facility Matching Grant Program offers a limited number of matching grants to nonprofit organizations to improve the energy efficiency of their facilities. To be considered for a matching grant, eligible Applicants must complete the following Application in its entirety.

Incomplete Applications will not be reviewed by Oncor.

Section 1: Contact Information			
Organization Name:			
Organization Tax ID:			
Primary Contact			
First Name:		Last Name:	
Mailing Address:			
Suite:		County:	
City:	State:	ZIP Code:	
Fax Number:		E-mail:	
Primary Phone:		Secondary Phone:	
How did you hear about the Program?			

Section 2: Facility Information			
In the following section, only enter information regarding the facility where the project will be located. A facility is deemed to be a single building and any directly connecting buildings. If the facility has more than one ESI ID number, list all of them on the application.			
Location of the Facility			
Street Address:			
City:	State: Texas	ZIP Code:	
ESI ID Number (on electric bill):			
Characteristics of the Facility			
1. Total square footage.....			
2. Year facility was constructed			
3. Is building part of a campus?		If yes, how many buildings are on campus?	
4. Is the facility owned by the organization listed above? (yes/no).....			
5. Name of the organization responsible for the electric bill:			
Facility Budget and Expenses			
1. Total annual energy spending per year (electric only).....		\$	
2. Total annual operations and maintenance budget		\$	

Section 3: Project Information			
A project is defined as a set of proposed energy efficiency upgrades at an eligible facility. Comprehensive projects that include a range of upgrades are encouraged.			
1. Brief description of the project: <input type="checkbox"/> HVAC <input type="checkbox"/> Lighting <input type="checkbox"/> Roofing <input type="checkbox"/> Solar <input type="checkbox"/> Window Film <input type="checkbox"/> Other:			
2. Materials:			
3. Quantity:			
4. Supporting Documentation: <input type="checkbox"/> Signed Bid or Quote <input type="checkbox"/> Project Savings File(s) <input type="checkbox"/> Proof of 501(c)(3) <input type="checkbox"/> Commercial Energy Audit (if applicable)			

5. Name of the company that completed the Project Savings File(s)	
Primary Contact Name:	Phone Number:
6. Estimated total project cost (including cost for equipment and installation).....	\$
7. Are there additional funds committed to this project (yes/no)?.....	
If yes, how much?	If no, are you seeking additional funds at this time (yes/no)?
Source of additional funds	
8. What is the estimated start date of the project?	
9. Estimated completion date?	

Section 4: Project Savings	
A printed copy of the Project Savings File(s) will need to be included with the application as support documentation. All grant allowance request amounts will be verified by Oncor during the application review process.	
1. Calculated Electric Peak Demand (kW*) Savings.....	
2. Calculated Annual Electric Energy (kWh*) Savings.....	
3. Estimated Grant Request (maximum is the lesser of 50% of the total project cost or \$100,000.....	
4. Have any projects of this type been installed by the applicant in other locations within the service area? <input type="checkbox"/> Yes <input type="checkbox"/> No	
5. Is the project a demonstration or pilot of other potential projects? (choose one) <input type="checkbox"/> a. No <input type="checkbox"/> b. Maybe, but none are known at this time. <input type="checkbox"/> c. There is a demonstration or test installation that we may repeat, but no other projects are planned or funded at this time. <input type="checkbox"/> d. This is a test installation and we are currently planning on similar projects.	

** kW and kWh savings are determined through calculations from the pre-retrofit portion of the Project Savings File(s)*

Section 5: Customer Participation Agreement

The undersigned (hereinafter “Customer”) is an electric delivery customer of Oncor Electric Delivery Company LLC (“Oncor”), and has submitted an application to participate in the Nonprofit Facility Matching Grant Program (the “Program”) offered by Oncor. In consideration of the ability to participate in the Program, and for other good and valuable consideration, the receipt, adequacy, and legal sufficiency of which are hereby acknowledged, Customer hereby agrees as follows:

- The submission of an application by Customer to participate in the Program does not guarantee receipt of grants or incentives. Grants and/or incentives are only available if all Program guidelines have been met, Oncor has approved the final project, and funds are available in the Program budget. Oncor will determine, in its sole discretion, which Program applicants/service providers receive grants/incentives and the amounts of any such grants/incentives. Oncor will determine the grant amounts based on the peak demand kW savings and project cost.
- Once the project is complete, verification of actual kW savings and project cost must be proven by the Project Savings File(s), Service Provider Bid or Quotes, and final project invoice(s) from the Service Provider. Any difference between Customer’s estimated (as specified in its application) and actual kW saving and/or project costs will result in re-evaluation by Oncor of any grant amount. Oncor may, in its sole discretion, decrease or deny any grant award as a result of such re-evaluation.
- Projects awarded a grant must be completed within 12 months from the date of grant approval. Grant awardees must notify Oncor within 60 days of grant expiration date for projects that will not be completed within the 12-month timeframe. If Oncor determines the project will not be completed within the one year due to unforeseen circumstances

beyond the Customer's control, the customer must complete and submit a Request for Modification, Extension, or Cancellation to apply for an extension.

- Matching grants associated with the Program are only for energy efficiency measure(s) installed at the Customer site(s) that receive service from Oncor, as evidenced by an Electric Service Identifier (ESI ID) number. Oncor may withhold matching grant payments committed to the Customer if the project site is proven to not receive service from Oncor.
- Matching grants paid to the Customer may not exceed 50% of the aggregate actual project cost or \$100,000, whichever is less, for any energy efficiency saving and/or energy generating measure(s).
- A grant will only be paid to the Customer after receipt of post-project documentation and verification by Oncor of actual kW savings and project cost.
- All installations of energy efficiency savings and/or energy generating measures must be installed within one year of a grant award notification in order to receive the grant requested.
- Oncor is solely offering and providing grant payments to the Customer based on the energy efficiency project. Oncor is not supervising the work performed for the Customer and is not responsible in any way for proper completion of that work or proper performance of any equipment purchased. Oncor is simply providing funding to assist Customer in implementing energy efficiency savings and/or energy generation measures. Oncor does not guarantee any energy efficiency savings or other results by its approval of the Customer's application, this Customer Participation Agreement, payment of incentives, or by any other of its actions.
- Oncor may include a description of this project, including the Customer's name, organization name, or company's name (if applicable), service provided, project cost, and energy savings and/or generation, in reports, studies, and other documentation required by Oncor, the Public Utility Commission of Texas, and the Texas Legislature. Oncor may also be required to disclose any documents pursuant to laws, regulations or legal process. Any documents disclosed pursuant to laws, regulations or legal processes may be accessible by the general public. Oncor will attempt to treat sensitive information confidential to the extent possible. However, by submitting an Application and/or attempting to Participate in the Program, each Applicant, understands and agrees that any information it provides to Oncor in connection with the Program could be publicly disclosed.
- Oncor is not responsible for any tax liability imposed on the Customer as a result of payment of the incentives. Customer should consult a tax attorney to determine any potential tax liabilities as a result of receiving incentives for energy efficiency savings and/or energy generation measures. Oncor is not providing tax advice, and any communication by Oncor is not intended and cannot be used for the purpose of avoiding penalties under the Internal Revenue Code.
- In the event of a dispute between the Customer and Oncor, the Customer may file a complaint with the Public Utility Commission of Texas concerning Oncor.
- In connection with its application and the project, Customer shall provide Oncor and its affiliates with access to and/or copies of the Customer's utility bills, project documentation, all invoices related to the purchase and installation of the energy efficiency measure, and technical and cost information related to or arising from the project or its participation in the Program. Until four (4) years following payment of all grants/incentives for Services, Oncor and its representatives or agents will have the right to examine, reproduce and audit these records, at any reasonable time, to the extent

Oncor deems necessary to verify completion of the project, compliance with the Program guidelines and conformity of the approved project terms.

- Customer shall provide Oncor or independent measurement and verification person selected by Oncor or the Public Utility Commission of Texas, upon three (3) days' prior verbal notice, with full and complete access to the Customer project site for any purpose related to or arising from the Program.
- Customer shall not use the Oncor or Take A Load Off[®], Texas trademarks without written approval by Oncor.
- Customer shall not communicate with the media about the Program without written authorization and coordination with Oncor.
- Customer acknowledges that the project would not have been accomplished or would have been completed with less efficiency equipment except for the existence of the incentive provided by this Program.
- **THAT ANY REVIEW, INSPECTION, OR ACCEPTANCE BY ONCOR OF THE PROJECT SITE, PROJECT, OR THE DESIGN, CONSTRUCTION, INSTALLATION, OPERATION OR MAINTENANCE OF THE MEASURES IS SOLELY FOR THE INFORMATION OF ONCOR AND THAT, IN PERFORMING ANY SUCH INSPECTION OR REVIEW OR IN ACCEPTING THE MEASURES, ONCOR MAKES NO REPRESENTATION OR WARRANTY WHATSOEVER, WHETHER EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION WARRANTY OR MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AS TO THE ECONOMIC OR TECHNICAL FEASIBILITY, CAPABILITY, SAFETY, OR RELIABILITY OF THE MEASURES, THEIR INSTALLATION BY A CONTRACTOR, OR THEIR COMPATIBILITY WITH THE CUSTOMER'S FACILITIES.**
- Except as otherwise prohibited by law, Customer agrees to and will defend, protect, indemnify and hold harmless Oncor (together with its majority investor, Energy Future Holdings Corp., and all subsidiaries and affiliates of Energy Future Holdings Corp., and all officers, directors, equity holders, associates, related firms and entities, employees, servants and agents of both Oncor and each such subsidiary or affiliate, "Oncor Group") and the Oncor Group from and against all claims, losses, expenses, attorneys' fees, damages, demands, judgments, causes of action, suits, and liability in tort, contract, or any other basis and of every kind and character whatsoever (collectively, "Claims"), for personal injury, death, or property damage of Customer, any contractor or service provider engaged by customer, and all affiliated or related firms and entities, officers, directors, partners, limited partners, equity holders, associates, employees, servants and agents of each (collectively, "Customer Group"), arising out of or incident to or related in any way to, directly or indirectly, this Customer Participation Agreement, the Program or any project to be completed pursuant to the Program, or to any activities of any member of Customer Group while on any premises actually or allegedly owned, controlled, or operated by Oncor, including, but not limited to, Claims arising out of or resulting from (1) any condition of the premises, (2) separate operations being conducted on the premises, or (3) the imperfection or defective condition, whether latent or patent, of any material or equipment sold, supplied, or furnished by Oncor; and **further, IT IS THE EXPRESS INTENT OF THE PARTIES THAT, FOR THE PURPOSES OF THIS PARAGRAPH, CLAIMS, AND CUSTOMER'S OBLIGATIONS TO DEFEND, PROTECT, INDEMNIFY, AND HOLD HARMLESS, WILL INCLUDE, BUT NOT BE LIMITED TO, CLAIMS ARISING OUT OF OR RESULTING FROM ONCOR GROUP'S SOLE OR CONCURRENT (1) NEGLIGENCE, (2) STRICT LIABILITY, OR (3) OTHER FAULT OF ANY NATURE.**

- Except as otherwise prohibited by law, for all Claims except those for personal injury, death, or property damage of any member of Customer Group within the scope of the preceding paragraph, Customer agrees to and will defend, protect, indemnify, and hold harmless Oncor Group from and against any and all Claims arising out of or incident to or related in any way to, directly or indirectly, this Customer Participation Agreement, the Program, any projects to be completed pursuant to the Program or materials to be performed or supplied there under, or to any activities of any member of Customer Group while on any premises actually or allegedly owned, controlled, or operated by Oncor, including, but not limited to, Claims arising out of or resulting from (1) any condition of the premises, or (2) separate operations being conducted on the premises, or (3) the imperfection or defective condition, whether latent or patent, of any material or equipment sold, supplied, or furnished by Oncor; and **further, IT IS THE EXPRESS INTENT OF THE PARTIES THAT, FOR THE PURPOSES OF THIS PARAGRAPH, CUSTOMER'S OBLIGATIONS TO DEFEND, PROTECT, INDEMNIFY, AND HOLD HARMLESS, WILL INCLUDE, BUT NOT BE LIMITED TO, CLAIMS ARISING OUT OF OR RESULTING FROM ONCOR GROUP'S CONCURRENT (1) NEGLIGENCE, (2) STRICT LIABILITY, OR (3) OTHER FAULT OF ANY NATURE.**
- To the extent necessary to permit Oncor to enforce any term, clause, or condition of this Agreement, Customer agrees that with respect to any Claims brought against Oncor Group, Customer will and does hereby waive as to Oncor Group any defense it may have by virtue of the workers' compensation laws of any state.
- Neither party will be liable to the other in contract, tort, or on any other basis, for any consequential damages of any nature, including, but not limited to, lost profits or revenues, loss of customer goodwill, business interruption costs, overhead costs, costs of capital, or loss of use of money. Consequential damages also include attorneys' fees, except as otherwise specifically provided for in this Customer Participation Agreement. It is expressly understood that this paragraph will be subjugated to, and will not limit or otherwise affect in any manner, Customer's obligations to indemnify and hold harmless Oncor Group.

This Customer Participation Agreement shall be governed by and construed in accordance with the laws of the State of Texas, The parties agree that the proper venue and jurisdiction for any cause of action relating to this Participation Agreement will be Tarrant County, Texas, unless such cause of action is within the jurisdiction of the Public Utility Commission of Texas ("PUCT"), in which case proper venue and jurisdiction will be at the PUCT.

Acceptance:

Applicant Signature: _____

Date: _____

Name: _____

Title: _____

Organization: _____

Oncor Nonprofit Facility Matching Grant Program Application - Certification

I, _____, certify that the information included in the 2010 Nonprofit Facility Matching Grant Application is true and accurate to the best of my knowledge.

Applicant Signature: _____

Date: _____

Name: _____

Title: _____

Appendix A: Nonprofit Facility Matching Grant Program Eligible Upgrades

Eligible Upgrades or Projects	Ineligible Upgrades or Projects
<p>Cooling Measures</p> <ul style="list-style-type: none"> • High-efficiency air conditioning replacements • High-efficiency heat pump replacements • Duct sealing • Fan and pump motor efficiency upgrades • Geothermal ground source heat pumps <p>Lighting Measures</p> <ul style="list-style-type: none"> • Hard-wired high-efficiency fluorescent lighting that replaces less-efficient lighting • Lighting controls to reduce operating hours (in conjunction with lighting efficiency upgrades) • CFLs with hard-wired ballast • T-12 to T-8 or T-5 retrofits • LED exit sign retrofits <p>Core and Shell Measures</p> <ul style="list-style-type: none"> • ENERGY STAR® Roofing • Insulation • Window film • Solar Photovoltaic 	<ul style="list-style-type: none"> • Measures that do not raise efficiency above current standards • Measures that do not surpass the Program Measures Estimated Useful Life • Cogeneration and self-generation projects • Load shifting/load management measures • Load reduction caused by building vacancies, decreased production, or other changes in occupant characteristics or behavior • Measures that rely solely on change in customer behavior and require no capital investment • Measures for which incentives were received under another OnCor Program • Repair and maintenance measures • Energy-efficient gas measures when replacing non-electric technologies • Measures that result in negative environmental or health effects

Appendix B: Electricity Usage Worksheet

Month	Electric Bill (\$\$)	Electricity Demand (kW)
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		
Total		
Average		

- If the electricity usage is greater than 250 kW during June, July, August, or September, the facility is classified as commercial* and a commercial energy audit is required.
- If the electricity usage is less than 250 kW during June, July, August, or September, the facility is classified as small commercial** and no commercial energy audit is required.

***Commercial:** A facility is classified as commercial if the maximum on-peak demand is greater than 250 kW during on-peak months. The on-peak demand period is defined as the hours between 1 p.m. to 7 p.m., Central Standard Time, Monday through Friday, June through September, excluding weekends and federal holidays.

****Small Commercial:** A facility is classified as small commercial if the maximum on-peak demand is less than 250 kW during on-peak months. The on-peak demand period is defined as the hours between 1 p.m. to 7 p.m., Central Standard Time, Monday through Friday, June through September, excluding weekends and federal holidays.

Appendix C: Nonprofit Matching Grant Checklist

QUALIFYING PHASE

Owner	Task	Complete (date)
Applicant	Confirm that the organization meets the eligibility requirements listed on Page 2 .	
Applicant or Service Provider	Confirm that the facility meets the eligibility requirements listed on Page 2 .	

PRE-ASSESSMENT PHASE

Owner	Task	Complete (date)
Applicant or Service Provider	Collect the past twelve (12) months of facility electric bills. Complete the <u>Electricity Usage Worksheet</u> in Appendix B of this document. The results of this form will classify the facility type.	
IF THE FACILITY IS CLASSIFIED SMALL COMMERCIAL		
Service Provider	Schedule and complete a Facility Pre-Assessment using the pre-retrofit portion of the Project Savings File(s) located on the Program Web site.	
Applicant and Service Provider	Review the results of the Facility Pre-Assessment and the pre-retrofit portion of the Program Savings File(s) to select the desired upgrade(s) to be included in the Application. If unsure what upgrade(s) are eligible, see Appendix A: Nonprofit Facility Matching Grant Program Eligible Upgrades or contact the Oncor Program Manager.	
Applicant and Service Provider	Confirm that the project is an eligible project listed in Appendix A or submit to Oncor for approval.	
IF THE FACILITY IS CLASSIFIED COMMERCIAL		
Applicant	Visit www.takealoadoftexas.com to apply for a <u>Commercial Energy Audit Program (CEAP)</u> for a full energy assessment for the facility. Contact the Oncor Program Manager once the <u>Commercial Energy Audit Program Application</u> has been submitted.	
Applicant	Once the energy audit has been completed, select a Service Provider to complete the pre-retrofit portion of the Project Savings File(s) for the measure(s) to be included in the Application.	

Service Provider	Review the <u>Commercial Energy Audit Report</u> and complete the pre-retrofit portion of the coordinating Project Savings File(s) to the proposed project.	
Applicant or Service Provider	Confirm that the project is an eligible project listed in Appendix A or submit to Oncor for approval.	

APPLICATION SUBMISSION PHASE

Owner	Task	Complete (date)
Applicant	Complete and sign the <u>2010 Nonprofit Facility Matching Grant Application</u> .	
Applicant	Assemble a copy of IRS documentation to show proof of 501(c) (3) status (i.e., I-990 or IRS Determination Letter of Ruling).	
Applicant	Assemble signed hard copy of all Project Savings File(s) including facility photos. <i>(NOTE: There should be one completed Project Savings File for each measure in the proposed project.)</i>	
Applicant and Service Provider	Include an original, signed bid or quote from the selected Service Provider.	
Applicant	Review all application documents for completeness and submit to Oncor for review.	
Service Provider	Submit electronic copy of all Project Savings File(s) that have been submitted in the application packet by the Applicant. <i>(NOTE: Please review the <u>2010 Nonprofit Facility Matching Grant Program: Program Manual</u> for additional instruction.)</i>	
IF THE FACILITY IS CLASSIFIED “COMMERCIAL”		
Applicant	Include a copy of the <u>Commercial Energy Audit Report</u> in the application submission.	
Oncor Program Manager	Contact the Applicant once all documentation has been received.	

GRANT REVIEW PHASE

Owner	Task	Complete (date)
Oncor Program Manager	Contact the Applicant with project-specific grant review timeline, cost-effective scoring, and overall potential scoring of the project. Discuss with Applicant any modifications to project documentation that may need to be made prior to the Grant Review Committee submission.	

Applicant and/or Service Provider	If any modifications were made to the original application documentation (as discussed with the Oncor Program Manager), the modified documents should be submitted to Oncor.	
Oncor Program Manager	Present proposed project to Grant Review Committee for evaluation.	
Oncor Program Manager	An official Matching Grant Notification Letter will be sent to the Applicant.	

INSTALLATION PHASE

Owner	Task	Complete (date)
Applicant	Contract with Service Provider to complete the installation of approved measure(s).	
Service Provider	Install the upgrades based on the Applicant's guidelines.	
Service Provider	Complete and submit an electronic copy of the post-retrofit portion of the originally submitted Project Savings File(s) with necessary support documentation such as proof of project cost, post-project photos, and any additional data to the Oncor Program Manager.	
Oncor Program Manager	Review electronic Project Savings File(s) submitted for accuracy. Contact Applicant and/or Service Provider to discuss files.	
Applicant and/or Service Provider	Complete and submit a hard copy of completed Project Savings File(s) with necessary support documentation such as proof of project cost, post-project photos, and any additional data to the Oncor Program Manager. <i>(Note: The pre-retrofit and post-retrofit portion of the file(s) should be completed at this point.)</i>	
Oncor Program Manager	Schedule Post-Installation Inspection with Applicant and Service Provider.	

POST-INSTALLATION INSPECTION PHASE

Owner	Task	Complete (date)
Applicant and Service Provider	Be available for the Post-Installation Inspection and provide access to the project site.	
Inspector	Inspect project site and send results to Oncor Program Manager.	
Oncor Program Manager	Review feedback from Inspector and make matching grant adjustments, if necessary. Contact Applicant with inspection results.	

Oncor Program Manager	Submit invoice for grant payment. Contact Applicant with proposed date the funds will be delivered.	
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Notes: