



Implementation Steps and Processes

City and School Matching Grant Programs

Phase	Participant Responsibility	Program Responsibility
Phase 1: Project Identification and Grant Application Timeframe 1-2 months	<ul style="list-style-type: none"> Identify project Determine appropriate steps to follow to apply for grant 	<ul style="list-style-type: none"> Assist participant in identifying projects that may be eligible for Program (if participant is aware of Program at this stage)
	<ul style="list-style-type: none"> Find contractor Work with contractor to develop kW savings estimate and identify M&V approach Identify budget and projected energy savings for projects 	<ul style="list-style-type: none"> Provide assistance in evaluating energy-efficiency project opportunities Support participant and participant's contractor upon request
	<ul style="list-style-type: none"> Determine sources of funds for projects 	<ul style="list-style-type: none"> Help identify and evaluate project funding options upon request
	<ul style="list-style-type: none"> Submit complete Application with signed bid specifications and/or contractor quote, completed W-9, and Project Savings Form 	<ul style="list-style-type: none"> Receive Application - Applications submitted using estimates only receive preliminary grant awards. Final grant award dependent upon final project cost Send response via email to participant
Phase 2: Application Review Timeframe 2-3 months		<ul style="list-style-type: none"> Review Application to determine if complete
	<ul style="list-style-type: none"> Fill gaps in Application Resubmit Application 	<ul style="list-style-type: none"> Call participant to fill gaps, if needed Receive resubmitted Application
		<ul style="list-style-type: none"> Grant Review Committee approves/denies Application
		<ul style="list-style-type: none"> Notify grant participants of results by letter within sixty days of Application submission
Phase 3: Pre-Project Measurement and Verification (M&V) Timeframe 1 month	<ul style="list-style-type: none"> Will work with Program Implementer to establish inspection timeline for deemed savings or M&V plan If project requires M&V plan, participant will be responsible for all costs associated with M&V process 	<ul style="list-style-type: none"> Contact participants within one week to establish inspection timeline for deemed savings or M&V plan
	<ul style="list-style-type: none"> Work with contractor to follow documentation requirements 	<ul style="list-style-type: none"> Support participant and participant's contractor upon request
	<ul style="list-style-type: none"> Complete pre-project documentation for M&V steps Submit to Program Implementer for review 	<ul style="list-style-type: none"> Review documentation for accuracy

Phase	Participant Responsibility	Program Responsibility
Phase 3: Pre-Project M&V	<ul style="list-style-type: none"> • Make site available to Program Implementer and/or Oncor for inspection 	<ul style="list-style-type: none"> • Program Implementer and/or Oncor may schedule inspection • Send approval to participant to start project
Phase 4: Project Implementation Timeframe 3-4 months	<ul style="list-style-type: none"> • Participant and contractor begin project • Notify Program Implementer if project completion will be delayed beyond the one year timeframe 	<ul style="list-style-type: none"> • Stay in communication with participant to ensure project is on track
	<ul style="list-style-type: none"> • Notify Program Implementer of completed project 	
Phase 5: Post-Project M&V Timeframe 1 month		<ul style="list-style-type: none"> • Contact participants to request post-project documentation
	<ul style="list-style-type: none"> • Work with contractor to follow documentation requirements for deemed savings or M&V plan requirements 	<ul style="list-style-type: none"> • Support participant and participant's contractor upon request
	<ul style="list-style-type: none"> • Complete post-project documentation for deemed savings or M&V plan requirements • Submit to Program Implementer for review 	<ul style="list-style-type: none"> • Review documentation for accuracy
	<ul style="list-style-type: none"> • Make site available to Program Implementer and/or Oncor for inspection 	<ul style="list-style-type: none"> • Program Implementer and/or Oncor may schedule inspection • Send approval to participant of post-project approval
Phase 6: Grant Award Timeframe 2 months		<ul style="list-style-type: none"> • If the project uses deemed savings, Oncor will pay 100% of the grant funding to the participant within 4-6 weeks of post-project verification • If the project uses M&V, Oncor will pay 50% of the funding to the participant within 4-6 weeks of post-project verification
	<ul style="list-style-type: none"> • Complete on-going M&V activities, if applicable 	<ul style="list-style-type: none"> • Assist participant with on-going M&V activities, if applicable
	<ul style="list-style-type: none"> • Submit M&V documentation for review 	<ul style="list-style-type: none"> • Review M&V documentation
		<ul style="list-style-type: none"> • If the project uses M&V, Oncor will pay the participant the additional 50% of grant funding within 4-6 weeks of post-project verification