



# Home Energy Efficiency Standard Offer Program (HEESOP)

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2021 Program Manual  
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## 1 INTRODUCTION

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Welcome to the 2021 Oncor Home Energy Efficiency Standard Offer Program (HEE SOP or the program). The HEE SOP provides incentives to registered, approved energy efficiency service providers to implement electric energy efficiency projects at Oncor residential customer locations. This program manual is a guide to HEE SOP requirements and processes for our network of participating service providers.

This program complies with the standard offer program requirements published by the Public Utility Commission of Texas (PUCT). This program manual is intended to inform service providers of the program requirements and processes. However, service providers should also review the PUCT rules related to energy efficiency programs and the requirements in the TRM for energy efficiency programs, and are required to comply with such rules and requirements.

This manual summarizes program requirements, processes, and incentives, but may not address all scenarios. Oncor has full discretion to interpret or modify requirements and may revise the manual at any time.

Visit the Oncor Energy Efficiency Program Management (EPPM) tool, available at <https://www.oncoreepm.com> access additional registered service provider resources, including service provider applications, incentive applications, savings calculators and project documentation tools, as well as program rules and incentive budget updates.

We are here to help! If you have any questions after reading these materials, please don't hesitate to contact our program help desk at 1.866.258.1874 or via email at [EEPMSupport@oncor.com](mailto:EEPMSupport@oncor.com)

## 2 PROGRAM OVERVIEW

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The primary objective of the HEE SOP is to achieve cost-effective reduction in energy consumption during peak summer demand. Additionally, the program is designed to:

- Encourage private sector delivery of energy efficiency products and services.
- Achieve customer energy and cost savings.
- Significantly reduce barriers to participation by streamlining program procedures.
- Encourage participation by a wide range of service providers.

### 2.1 Program Options

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The HEE SOP offers four options for serving residential customers:

- The **Reserve Option** offers service providers individually Service Provider (SP) allocated incentive funding for the addition of insulation projects at single-family residential dwellings, up to and including four-plex buildings.
- The **HVAC Option** offers individually Service Provider (SP) allocated incentive funding incentives for HVAC projects at single family residences.
- The **Multifamily HVAC Option** allows service providers to propose custom incentives for HVAC projects in multifamily dwellings that will result in cost-effective energy savings and demand reduction. Incentives are awarded to cost-effective energy efficiency projects through a bidding process.

## 2.2 Customer Eligibility

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Residential customers living in permanent single-family dwellings and qualified multifamily dwellings with active Oncor service are eligible to have energy efficiency measures installed at their homes as part of the HEE SOP. To be considered permanent, manufactured or mobile homes must have all mobility devices removed.

### Single-Family Dwellings

Single-family dwellings are defined as detached single dwelling units, or attached dwelling units within a building containing four residential units or fewer (a four-plex).

### Multifamily Dwellings

- Multifamily dwellings are defined as attached dwelling units within a building containing more than four residential units.
- A multifamily project site is defined as one or more multifamily dwelling units located on a single piece of property or adjacent pieces of property, under management or owned by a single party.
- Duplex and triplex units can be considered multifamily dwelling units if they are located on a property—or adjacent properties—and are under management or owned by a single party.

## 2.3 Energy Efficiency Measures

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### *General Measure Requirements*

Service providers may install energy efficiency measure for which a deemed savings value (as noted in the Texas TRM, Volume 8.0), has been provided, including appliances, water heating, lighting, space conditioning and building shell measures installed in qualified residential or multifamily buildings (not all measures are offered in Oncor's programs). In addition to some listed examples in this section, service providers may propose other energy efficiency measures, provided they meet the following requirements:

- Measures must be preapproved by Oncor and offered thru the program option.
- Measures must produce a measurable and verifiable electric demand reduction and/or reduce electricity consumption (an individual energy efficiency measure may produce only demand or energy reduction if that energy efficiency measure is included in a project producing both).
- Measures must produce savings through an increase in energy efficiency or a substitution of another energy source for electricity (provided the substitution results in overall lower energy costs, lower energy consumption and the installation of high efficiency equipment).
- Measures must surpass required state and federal minimum efficiency standards, and meet or exceed installation and efficiency standards provided in the Texas TRM, Version 8.0.
- Measures must meet or exceed minimum equipment standards as provided in this program manual.
- Measures must comply with all requirements of Substantive Rule §25.181, including renewable energy measures.
- Eligible energy efficiency measures do not include repair or maintenance activities or behavioral changes.
- Any energy efficiency measure approved by the PUCT and included in its Residential Standard Offer Program template is eligible for HEE SOP incentives.

As a general rule, energy efficiency measures involving plug loads (equipment or appliances that are plugged into standard electrical outlets) are not permitted.

### *Examples of Eligible Measures*

The following are examples of measures that are eligible for the current program incentives:

### **Cooling and Ventilation Measures**

- High-efficiency air-conditioning replacements.
- Ceiling, floor and wall insulation.
- High-efficiency heat pump replacements.

### **Structural Measures**

- Insulation: ceiling, wall and floor.

### *Examples of Ineligible Measures*

The following measures are ineligible for program incentives:

- Measures that do not raise efficiency above current minimum state and federal standards.
- Cogeneration and self-generation projects, except for renewable demand side management (DSM) technologies approved by the PUCT.
- Load shifting/load management measures.
- Load reductions caused by vacancies.
- Measures that rely solely on changes in customer behavior and require no capital investment.
- Measures for which incentives were received under another Oncor program.
- Repair and maintenance activities.
- Energy-efficient gas measures when replacing nonelectric technologies.
- Measures that result in negative environmental or health effects.
- Water-saving devices such as showerheads and faucet aerators.
- Measures that are not installed properly or in accordance with program installation requirements.

### *Additional Requirements*

#### **Existing Equipment Must Still Be in Place at the Time of Application**

If any of the baseline equipment at a project site has been removed or the proposed energy efficiency measures have already been installed prior to the execution of the HEE SOP addendum, the project, or the affected portions thereof, will be disallowed.

## **3 INCENTIVES**

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Oncor agrees to make an incentive payment to the service provider based upon the sum of the verified incentive savings derived from the project. The total incentive payment due to the service provider will be calculated by multiplying the verified kilowatt and kilowatt hour savings by the applicable incentive rate. Service providers will distribute incentives to the applicable host customer. Service providers are only required to describe the value of the incentive they determine to provide to the customer.

To estimate incentive amounts for your project, use the HEE SOP online incentive calculator, available to registered Service Providers, located in EEPM under “Tools – Online Help.”

### **3.1 Program Incentives**

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The HEE SOP offers a combined incentive budget of \$9,113,190 for the 2021 program year across all options. Oncor reserves the right to adjust the budget as it deems necessary, in its sole discretion.

Project applications (production reports) will be accepted until midnight November 22, 2021, or until all HEE SOP funding for each program option has been exhausted. The status of available funding is available at any time by logging on to EEPM thru your registered service provider account.

### **Geographic Multiplier**

In order to promote energy efficiency activities in all areas of the service area, there will be an additional 15% geographic payment adjustment for all measures completed at sites outside the five-county Metroplex area. The Metroplex area includes Dallas, Tarrant, Rockwall, Denton, Ellis, Johnson and Collin counties.

### *Reserve Option Incentives*

#### **Allotment Tiers**

Service providers participating in the Reserve Option will receive a specified price per kilowatt and kilowatt hour of savings. This standard offer price is the same for all service providers in the Reserve Option. Terms are outlined in the HEE SOP addendum for each service provider.

Each approved service provider can be allotted one of three tier levels of reserved funding, with a reserve up to \$5,000, \$15,000, \$30,000 or \$50,000 for the given production period. Oncor can adjust these allocations based on past Provider performance. Tiers are allocated according to criteria that include:

- Prior year project volume.
- Prior year cumulative failure rate (CFR).
- Years of program participation.
- Post-inspection results.

New companies and returning service providers that experienced high failures may be offered a lower funding tier than the previous year, and can be required to schedule a site visit with an inspector to observe the service provider's work. If the service providers fail to prove their work knowledge and installation of measures during the on-site observation, they will not be allowed to participate in the program. If the service provider passes the on-site observation, the service provider will be subject to additional random post-testing. Any post-testing failures will result in the service provider's immediate termination from the program.

If a service provider successfully expends their entire allotment, they may request additional funding within their tier. To be considered for additional funding, a service provider must have:

- A CFR of 5% or lower.
- No unresolved customer complaints.

Any additional funding will be required to be used by or before November 23, 2021.

### *HVAC Incentives*

Service providers participating in the HVAC Option will receive a specified price per kilowatt and kilowatt hour of savings. This standard offer price is the same for all service providers within the HVAC Option. Terms are outlined in the HEE SOP addendum for each service provider.

#### **Reserve Option and HVAC Option Funding Allocation and Performance Milestones**

Reserve and HVAC Options provide a specific allocation of funding for each service provider. Once a service provider has been approved to participate in one of these Options, they will be expected to meet monthly performance milestones as presented in the following table as examples:

	Reserve Option Weekly PR Cap \$15,000			HVAC Weekly PR Cap \$40,000		
Milestones	\$5,000	\$15,000	\$30,000	\$15,000	\$30,000	\$50,000
All milestones	90%	90%	90%	90%	90%	90%
<ul style="list-style-type: none"> <li>Initial tier allocations are determined by historical PR volume.</li> <li>Each SP meeting their milestone can receive their tier allocation amount at the beginning of each month (if funding is available and SP's CFR is less than 5%)</li> <li>Any SP not meeting their 90% milestone will lose their remaining funding and moved.</li> <li>If the SP wants to continue in the program they can be put in the a lower tier.</li> <li>If SP misses their milestone in the lowest level of allocation, they can continue participation in the program at the Program Manager's discretion, as long as funding is available and their CFR is less than 5%.</li> <li>SPs can request additional funding (<b>via email</b>) between milestones if funding is available and CFR is less than 5% once they have submitted 75% of their tier allocation.</li> <li>SPs exceeding their allocation for two consecutive months can be eligible to move to the next higher level of allocation if their CFR is less than 5% and funding is available at their request.</li> <li>New SPs can start in lowest tier.</li> <li>When overall funding cannot support the monthly allocation, each SP will receive either 10%, 20% or 30% of the remaining funding based on their allocation level based on their email request.</li> </ul>						

All Program funding and allocations are subject to Program Manager discretion. The above chart is what can be available depending on total program budget available and the notification by the Provider to the Program Manager. ***It is the responsibility of each Provider to monitor the option budget thru EEPM. Program Manager is not responsible for notifying the Provider of their remaining budget available or the amount remaining in the program budget.***

### Multifamily HVAC Incentives

Incentive funding is made available on a per-project basis. Providers use a bid response spreadsheet to enter project and company information, proposed HVAC unit information and requested incentive amounts. The spreadsheet will calculate and display the proposed project's cost-effectiveness score. Bidders may use this feature to optimize their proposals to achieve higher cost-effectiveness scores. Proposals with a bid score of less than 1.0 will not be considered.

In addition to cost-effectiveness, Oncor may identify other criteria for project selection such as, but not limited to, geographical location, timeline, previous participation record and other project-related information to help determine final proposal awards. Please contact the Program Manager for additional information.

## 3.2 Incentive Limits

### Service Provider Incentive Limits

Total annual combined incentive payments per service provider, inclusive of its affiliates, are limited to \$700,000.



### *Per-Project Incentive Limits*

Individual HVAC system replacement incentives are capped at \$2,800. Weekly production reports are also limited to between \$500 and \$15,000 (Reserve Option) or \$40,000 (HVAC Option).

### 3.3 Incentive Payments

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For approved measures with deemed savings, Oncor will pay the service provider the incentive payment within 45 days after the date Oncor approves the applicable production report.

Notwithstanding anything to the contrary, Oncor will only make incentive payments to the extent that funding remains available in the applicable HEE SOP option budget at the time the associated production report is received by Oncor.

### 3.4 Adjustments to Incentives Following Post-Inspections

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After on-site inspections are completed, projects will be evaluated on a measure-by-measure basis to calculate any failure(s) adjustment for energy and demand savings and incentives.

In the event the service provider disagrees with the payment adjustment, the service provider may request that all information be reviewed again after additional information is provided by the SP. However, final payment adjustments will be in the sole discretion of Oncor. It is the responsibility of each Provider to provide any photos/documentation needed for Oncor to review per the emails that each Provider receives within in the published timeline as inspection failures are reported.

## 4 PROGRAM OPTIONS

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### 4.1 Reserve Option

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The Reserve Option offers participating service providers a reserved annual allocation of incentive funding, which they can use to complete energy efficiency projects in single-family dwellings. Service providers commit to monthly production levels and may be able to increase their funding tier level with high performance.

#### *Project Life Cycle*

Service providers may submit project applications only after applying to the program and executing an HEE SOP addendum. See Section 5, “How to Participate,” for more information on joining the program as a service provider.

Reserve Option documentation generally consists of a post-installation production report and supplemental documentation. It is the sole responsibility of the SP to ensure that Oncor receives all required project application materials by close of business on the applicable due date.

#### **Production Period**

During the project implementation period (the “production period”), the service provider performs marketing, sales and installation activities, reporting progress on a regular basis to Oncor. Throughout the production period, the service provider may submit applications for Reserve Option incentives via EEPM. Work submitted for incentive payment must be completed only during the program production period.

Most Reserve Option projects do not require program preapproval prior to installation. However, preapproval is required for wall insulation and floor insulation. Contact your program manager prior to beginning these projects.

## Final Documentation for Reserve Project Options

### ***Production Report***

The primary reporting instrument during the production period is the production report, which serves as an invoice for HEE SOP incentives.

For each installation, the service provider will enter a project into EEPM, providing data, including host customer information, location, account, meter and ESID, as well as installed measures and associated energy and demand savings and incentive amounts.

Once all data has been entered and reviewed, submit this data to Oncor in the form of an electronic production report generated from the data entered. Incentive amounts are calculated according to functions embedded in EEPM and may not be modified by service providers.

### ***Accompanying Documentation***

Production report forms are accompanied by a host customer agreement (HCA). This document must be completed electronically on official Oncor production report forms. Upload the signed HCA and production report summary in EEPM under the “Attachments” tab for each submitted production report.

The HCA includes permission for Oncor to inspect installations onsite, which may be required before incentive payments are approved. The HCA must be signed by the head of the household or a person listed as the tenant who is over 18 years old, and a copy of the completed HCA must be left with the host customer.

## 4.2 HVAC Option

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The HVAC Option offers service providers a reserved annual allocation of incentive funding for qualified HVAC measures installed in single-family residential dwellings only. SPs providing measures other than HVAC equipment should consider participation in the Reserve Option.

### ***Project Life Cycle***

Service providers may submit project applications only after applying to the program and executing the HEE SOP addendum. See Section 5, “How to Participate,” for more information on joining the program as a service provider.

Below is an outline of the HVAC Option application process from start to finish. Review this section carefully as they apply to all HEE SOP offer types. It is the sole responsibility of the applicant to ensure that Oncor receives all required project application materials by close of business on the applicable due date.

### ***Production Period***

During the project implementation period (the “production period”), the service provider performs marketing, sales and installation activities, reporting progress on a regular basis to Oncor. Throughout the production period, the service provider may submit applications for HVAC Option incentives via oncoreepm.com. Work submitted for incentive payment must be completed only during the program production period.

### ***Final Documentation for HVAC Option Projects***

HVAC Option documentation generally consists of a post-installation production report, electronically signed HCA, AHRI certificate and supplemental photos as required.

### ***Production Report***

The primary reporting instrument during the production period is the production report, which serves as an invoice for HEE SOP incentives. For each installation, the service provider will enter a project into EEPM, providing data, including host customer information, location, account, meter and ESIID, as well as installed measures and associated energy and demand savings and incentive amounts.

Once all data has been entered and reviewed, submit this data to Oncor in the form of an electronic production report, generated from the data entered. Incentive amounts are calculated according to functions embedded in EEPM and may not be modified by service providers. The production report will be forwarded to the service provider once a project application has been approved.

Only one entry will be allowed when entering customer information and measure data on the open production report in EEPM.

### ***Accompanying Documentation***

Production report forms are accompanied by the electronically signed HCA, AHRI certificate and supplemental photos as required. These documents must be completed electronically on production report forms. Upload the signed HCA and production report summary in EEPM under the "Attachments" tab for each submitted production report.

### ***Weekly Production Report Submission Timelines***

Production reports may be provided to Oncor on a weekly basis. Only one production report may be submitted per calendar week, which begins at 12:01 a.m. CT each Monday morning and ends at 11:59 p.m. CT each Sunday night.

## **4.3 Multifamily HVAC Option**

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The Multifamily HVAC Project Option allows service providers to propose custom incentives for HVAC projects in multifamily dwellings that will result in cost-effective energy savings and demand reduction. For example, a service provider may propose to replace all in-unit HVAC equipment within an entire apartment building. Service providers obtain Multifamily HVAC Option incentives via a request for proposals (RFP) process that awards funding based on the cost-effectiveness of their proposed projects.

For more information on how to participate in the Multifamily HVAC Option, contact the HEE SOP program manager.

## **5 HOW TO PARTICIPATE**

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### **5.1 Service Provider Eligibility and Requirements**

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#### ***Eligibility by Program Option***

All first-time service providers may apply to participate in the Reserve Option or HVAC Option. Multifamily HVAC incentives are awarded on a project-by-project basis.

#### ***Registering as a Service Provider***

To participate in the HEE SOP as a service provider, each contractor must:

- Register in EEPM, and
- Enter into the umbrella contract.

For each option you select to participate in, you must also:

- Apply to and be accepted to participate in selected HEE SOP project options.
- Execute the HEE SOP addendum with Oncor to participate in the program.

### **Join EEPM and Sign Umbrella Contract**

First-time service providers must first create an account within EEPM to be eligible to participate in the HEE SOP. Service providers must complete the profile level information in EEPM and sign the umbrella contract required to register in EEPM. These activities enable service providers to access the program application but do not guarantee acceptance into the program or any individual options.

### **Request Association with the Home Energy Efficiency Standard Offer Program**

Once registered within EEPM, the service provider will then need to contact the EEPM help desk at 866.258.1874 to associate with the HEE SOP. Once association has been completed, the service provider will log into EEPM to view the HEE SOP option.

### **Complete the Home Energy Efficiency Standard Offer Program Addendum**

The service provider will then complete the program addendum in EEPM and upload the executed document under the "Attachments" tab. Oncor will not entertain proposed modifications to this document unless unique circumstances merit and require revision, at the sole discretion of Oncor.

Service providers that participated in previous years will not be required to execute an umbrella contract or program addendum unless otherwise noted.

### **Submit a Service Provider Program Application**

Companies wanting to participate in the 2021 HEE residential programs will be required to submit a program application in EEPM for each HEE project option in which they intend to participate.

#### **Additional Required Documentation**

The following supplemental information should also be provided with your HEE SOP application:

#### ***Proof of Insurance***

Service providers must provide a copy of their required insurance Association for Cooperative Operations Research and Development (ACORD) certificate to demonstrate they meet the required minimum insurance levels to participate in the program. **ALL insurance ACORD certificates should be emailed to [eepminsurance@oncor.com](mailto:eepminsurance@oncor.com) by the insurance agent.**

#### **Service Provider Application Revisions**

Applications that have been reviewed by an Oncor program manager may be revised by a service provider no more than ONE TIME for corrections or supplemental information. If an application is submitted in error and the Oncor program manager is notified prior to their review, it may be revised by the service provider without penalty.

#### **Service Provider Selection Criteria**

Oncor requires applicants to demonstrate their financial, technical and managerial qualifications as part of the application process to help ensure that the proposed projects will be successful in delivering the estimated energy savings and the applicant is committed to fulfilling program objectives and is competent to complete the proposed project.

Oncor will review each application using quantifiable criteria such as the previous program year CFR, production report volume, historical data, and any previous lockouts or customer complaints, with the goal of responding to each application within 10 business days of submission. Companies that fail to meet the criteria for high quality service providers will not be approved to participate in the 2021 HEE SOP.

New companies and returning service providers that have experienced high failure rates and/or post-testing issues will have the opportunity to apply for the Reserve Option or HVAC Option.

Oncor may, in its sole discretion, refuse to allow a service provider to participate in the HEE SOP for any reason, including prior program participation or participation in other programs.

### Service Provider Interview Option

Interviews can be required for first time applicants or at the request and discretion of Oncor. Service providers that meet the minimum application criteria can be contacted to schedule an interview. The interview will be used to verify application information and gain insight into the service provider's company, business models, management and technical expertise. During the interview, service providers are expected to prepare a short presentation and address follow up questions.

The presentation should include the minimum following content:

- The company's management structure.
- The business model that is used by the company.
- The marketing plan that will be used by the service provider.

## 6 GENERAL PROJECT AND APPLICATION GUIDELINES

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In addition to the application processes described within each project option section, the following general application guidelines apply to all HEE SOP projects.

### 6.1 Customer Copies and Leave-Behind Materials

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#### Customer Agreements

A copy of the completed HCA must be left with each host customer. This can be accomplished by emailing a copy or printing a hard copy for these documents. The HCA may not be altered except for incorporation within a service provider letterhead with preapproval.

#### Customer Disclosure Notice Forms

Customers must receive a hard copy of the Customer Disclosure Notice Form. A sample of this document is available on the "Resources" page in EEPM.

#### Oncor Energy Efficiency Tips Brochure

Customers must receive a hard copy of this brochure. Brochures can be ordered online in quantities of 250 for \$25 per order.

### 6.2 Application Copies

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All copies of applications, including supplemental documentation as required by each project option, must be uploaded in EEPM as required.

It is the sole responsibility of the applicant to ensure that Oncor receives all required project application materials by close of business on the applicable due date.

## 6.3 Application Corrections

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### *Customer Account Errors*

If errors related to customer information within submitted paperwork are found by the program reviewer, the following process will be used for resolution:

- The service provider will receive an email generated from EEPM and located on the "Comment" tab listing the customer name(s) that have an error.
- The service provider will have three business days to contact the EEPM help desk to request the customer(s) be excluded.
- Once the customer(s) are excluded, the service provider will receive an EEPM generated email confirming the exclusion.
- The service provider must electronically sign a new production report summary, and resubmit the production report in EEPM within three days.

### *Production Report Changes*

Should changes be required to a submitted production report, the service provider must contact the EEPM help desk via email or phone to submit a ticket for the requested changes. Service providers will be required to provide the reason(s) for the request.

## 6.4 Waitlisted Projects

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If the program allows, projects can be waitlisted once all program funding has been reserved. As additional funding becomes available, the funds will be reserved for projects on the waitlist in the order they are submitted. Should a project be waitlisted, the service provider should not proceed with the project until notified by Oncor that funding has become available, all required paperwork has been completed and the project has passed pre-inspection if necessary.

## 6.5 Subcontracting Policies

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Service providers may utilize subcontractors for Reserve, HVAC and Multifamily Options. In addition, service providers participating in any HEE Option may subcontract to a Multifamily HVAC Option service provider.

### *NO ONCOR EMPLOYEE INVOLVEMENT WITH SERVICE PROVIDER*

Service Providers must report to the Program Manager any known relationships it has with Oncor employees. No Oncor employee or family member of an Oncor employee may hold 5% or more of the voting ownership interests, either direct or indirect, in any Service Provider's company that participates in the Program. In addition, no Service Provider may employ as an executive officer or other policy-making employee, or retain as an independent contractor or consultant, any Oncor employee involved in decision making with respect to the Program.

## 7 PROJECT APPROVAL

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### 7.1 Project Evaluation Criteria

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Oncor may reject a project application for any reason in its sole discretion and is not required to supply any explanation for such rejection. Reasons for rejection may include, but are not limited to, the following:

- The project application is received after the budget for that option has been fully committed.
- The applicant's proposed production period cannot reasonably be expected to be completed by November 23, 2021.
- Required submittals are not received by deadlines stated in this program manual.
- The applicant fails to meet HEE SOP eligibility requirements.
- The applicant is found to have made material misrepresentations in the project application or on submitted documentation.
- The applicant fails to comply with applicable federal, state, and local laws and regulations.
- Oncor determines, based on information concerning the applicant or its affiliate(s), including any prior performance of the applicant or its affiliate(s) concerning energy efficiency programs that the applicant is unlikely to be able to successfully participate in the HEE SOP.
- Changes in laws or regulations occur that directly affect HEE SOP.
- Prior participation in the HEE SOP or low-income weatherization program resulted in a CFR of greater than 5%.
- Oncor, in its sole judgment, determines that the applicant is incapable of fulfilling the terms and conditions of the HEE SOP, the HEE SOP addendum or the umbrella contract.

Oncor may request clarification of, or additional information about, any item submitted as part of the project application. Applicants must respond to such requests within the time period specified by Oncor. If the clarification or additional information provided is not sufficiently responsive, Oncor may, in its sole discretion, request additional information or discontinue its evaluation of the submittal. Any applicant submitting an unsuccessful application may reapply for project funding by submitting another application. However, the applicant will lose its initial position in the order of submittal for budget reservation purposes, if applicable.

## COMPLIANCE WITH PROGRAM REQUIREMENTS

### SERVICE PROVIDER REQUIREMENTS

By executing the HEE SOP Program Addendum, the Service Provider warrants and represents that it is aware of and complies with all terms and conditions of the Contract Documents. The Service Provider also warrants and represents that it meets or exceeds all of the following qualifications required by Oncor for participation in the HEE SOP:

- Possesses and can demonstrate experience in implementing similar Projects.
- Can produce evidence of company existence for two years or prior participation experience in the HEE SOP.
- Can produce evidence of possession of all applicable licenses required under state law and local building codes including current TDLR HVAC license.
- Can produce evidence of possession of all building permits required by governing jurisdictions.
- Can produce the proof of insurance required as required by Oncor.

### PROJECT REQUIREMENTS

Service Provider warrants and represents that the Project meets all applicable federal, state, and local laws and regulatory requirements, including:

- The Project will result in energy savings and peak demand savings and a reduction in energy costs for the end-use customer.
- The Project will result in consistent and predictable energy savings and peak demand savings over the expected Measure life.

- The Project Application discloses all potential adverse environmental or health effects associated with the Measures to be installed, if any.
- The Project includes appropriate and adequate measurement, verification, and reporting procedures.
- Service Provider will comply with the customer protection requirements in PUCT Substantive Rule §25.181(u) while implementing the Project.
- Measures installed pursuant to the Project would not be installed even in the absence of the Project.
- The Project does not result in negative environmental or health effects, including effects that result from improper disposal of equipment and materials.

## 7.2 Inspections

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### *Scheduling Inspections*

During the review process, Oncor or its designated agent will perform inspections of a random sample of a statistically representative number of project sites to determine if energy efficiency measures have been installed properly and perform their intended functions. The service provider may be required to be on-site during the inspection.

Should Oncor not be able to contact a host customer after three repeated attempts, the service provider will be contacted and required to schedule the inspection at a time that is convenient to Oncor and the host customer.

Service providers must make every effort to obtain an active email address and a working phone number for each site. Should a contact number not be available, then the service provider must enter its number as the host customer's number. The service provider will be required to schedule the inspection appointment for a time that is convenient for the host customer and Oncor.

### *Inspection Criteria*

All energy efficiency measures installed in the HEE SOP must conform to or exceed the standards listed in the Texas TRM, Version 8.0. Oncor may require additional requirements to meet the inspection requirements. If energy efficiency measures installed do not meet these standards, they will not be eligible for incentives. Service providers will not be allowed to correct installation of energy efficiency measures for the purpose of receiving incentive payments unless specifically allowed to do so by Oncor, in its sole discretion.

Oncor reserves the right to reject any installed energy efficiency measure for any of the following reasons in its discretion:

- Poor workmanship.
- Service provider or host customer modification to the installed measure.
- Lack of Underwriters Laboratories (UL) listing.
- Measure not operating correctly.
- Measure or its installation poses a safety hazard.
- Measure or its installation poses an environmental hazard.
- Non-permissible access for verification for installed measures.
- Measure does not comply with local or state building codes or standards listed in the TRM.
- Measure does not comply with National Electric Code or National Electric Safety Code.
- Failure to comply with Oncor HEE SOP requirements or any applicable laws or regulations.



## 8 IMPORTANT PROGRAM DATES AND DEADLINES

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### Service Provider Applications

Service providers may apply to participate in HEE SOP until June 30, 2021. In addition, qualified HVAC companies may continue to apply beyond this date. The program manager may allow new submittals outside of this deadline on a case by case review as needed by the program.

### Project Submission Dates

Reserve and HVAC Options: EEPM will accept production reports for projects from March 1, 2021 at 10 a.m. CT until November 23, 2021, at 12 midnight or whenever funding is exhausted.

## 9 QUALITY CONTROL AND DISCIPLINARY PROCEDURES

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Service provider performance is evaluated and monitored for quality assurance throughout the course of the program.

### 9.1 Cumulative Failure Rate

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A service provider's CFR is monitored to maintain high program quality standards. Each service provider's CFR is updated after every project they complete. The CFR is calculated according to the following formula:

$$\text{CFR} = (\text{Total Adjusted Incentive Dollars for Failed Inspected Measures} \div \text{Total Requested Incentive Dollars for Inspected Measures}) \times 100$$

Example:

Total Adjusted Incentive Dollars for Failed Inspected Measures	\$500
Total Requested Incentive Dollars for Inspected Measures	\$10,000
$(\$500 \div \$10,000) \times 100$	CFR = 5%

### 9.2 Service Provider Lockouts

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If a service provider's inspection CFR exceeds 5%, the service provider can be subject to a lockout and, as such, not allowed to submit any additional projects. Oncor may also terminate the HEE SOP addendum and any other addendums in which the service provider participates. Please refer to Section 9, "Quality Control and Disciplinary Procedures," for a list of potential actions related to failure rates.

### 9.3 Termination of Service Provider Agreements

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Oncor may terminate any or all HEE SOP addenda or umbrella contracts in whole or in part, at any time, at its sole discretion, by providing written notice of termination to the service provider. The notice of termination will specify the effective date of any termination, and that the HEE SOP addendum or umbrella contract is terminated in its entirety. Termination may result from unacceptable performance, either during current or past HEE SOPs. Please review the HEE SOP addendum and umbrella contract for additional details.

Oncor may terminate based on: 1) quality of work; 2) submission of false or misleading information; 3) unapproved changes to the service provider staff; 4) negative customer feedback; 5) unethical conduct; 6) changes in service provider standings with other utilities or agencies; 7) falsification of air flow rate pretesting or post-testing; or 8) other issues identified by Oncor.

In the event that Oncor terminates an umbrella contract and program addendum, the service provider will finish any project already commenced that cannot be discontinued without breaching the HCA. Oncor will have no obligations with respect to any contractual obligations entered into between the host customer and service provider after the service provider’s receipt of Oncor’s notice of termination.

In the event that Oncor terminates an umbrella contract and program addendum prior to completion of a project, a customer’s only liability will be to pay the service provider the unpaid balance due for that portion of the project commenced and that cannot be discontinued without breaching the HCA; notwithstanding the foregoing, however, the customer shall not be required to pay the service provider for any portion of a project that the customer determines was not completed in compliance with the terms and conditions set forth in the manual.

## 9.4 Actions for Current Year Quality Issues

The HEE SOP employs a “three strike” system for service providers with quality issues or a CFR that surpasses 5%.

The following outline explains the potential actions Oncor generally takes once a service provider reaches a cumulative failure rate of 5% or fails to follow program requirements. Oncor does not by virtue of this outline waive any of its rights under any of its agreements with any service provider including, but not limited to, the right to terminate for any or no reason.

The three-strike system phases, and examples of failures by measure type, are outlined in the tables that follow.

### Three-Strike System Phases

Examples of Failure	Proposed Action Taken by Program Manager with Service Provider	Time Frame of Lockout
<b>Strike 1: Customer Not Impacted</b>		
<ul style="list-style-type: none"> <li>Reporting errors, including paperwork errors and/or EEPM system input errors.</li> <li>CFR reaches 5% or greater.</li> <li>Not meeting inspection requests and/or schedule times.</li> <li>Use of employees/workers not disclosed on the service provider profile employee tab.</li> <li>Failures will be classified as “Quality” or “Data entry”</li> </ul>	<ul style="list-style-type: none"> <li>First time offenders of a “Quality” failure(s) are given one chance to continue working and the next Production Report (PR) should have a 0% failure rate.</li> <li>Offenders of a “Data entry” failure(s) will be given the opportunity to continue working until three (3) “Data entry” failures occur.</li> <li>Discuss with SP workable solution to complete inspection requirement.</li> </ul>	<ul style="list-style-type: none"> <li>If next PR has any “Quality” failures SP is placed in a one-month lockout and SP must present action plan outlining steps taken to stop failures.</li> <li>After completing the one-month lockout period the SP will be unlocked and can resume work until any future PR contains a failure.</li> <li>SP placed in one-month lockout for inability to have required inspections completed.</li> <li>After three “Data entry” failures occur SP will be placed in a one-month lockout</li> </ul>
Examples of Failure	Proposed Action Taken by Program Manager with Service Provider	Time Frame of Lockout
<b>Strike 2: Customer Impacted</b>		

<ul style="list-style-type: none"> <li>• Installation/performance/work related /inspection failures and customer complaints.</li> <li>• Unauthorized use of Oncor in any service provider created marketing materials. Service provider uses Oncor website to submit/report manufactured ratings/comments for themselves and/or other service providers.</li> <li>• Use of marketing companies without disclosure as subcontractor.</li> <li>• Note: If SP repeats and/or continues offenses that have been documented from prior years in either program, then recommendation will be made for service provider to move to Strike 3. (Examples include pre- and post-testing and other required program standards.)</li> </ul>	<ul style="list-style-type: none"> <li>• Meet with service provider to explain failures and possible causes. Discuss appropriate actions that SP should take to eliminate these failures.</li> <li>• Impose a two-month lockout period to allow the SP time to address the areas that have caused the failures and have service provider develop a plan to present after the lockout period.</li> <li>• Meet with SP after two-month period to review the action plan from the service provider. If plan is acceptable, service provider is unlocked.</li> <li>• Should failures continue after service provider is unlocked the first time, PM will notify SP that they will be placed back into lockout for the remainder of the year.</li> </ul>	<ul style="list-style-type: none"> <li>• SP is locked out for a minimum of two months. No work can be done or production reports accepted during the two-month lockout period. After two-month lockout period is completed, the service provider can resume work until any future production report contains a failure. This is subject to available funding in either program.</li> <li>• Should failures continue after service provider is unlocked the first time, PM will notify service provider that they will be placed back into lockout for the remainder of the program year.</li> </ul>
<b>Examples of Failure</b>	<b>Proposed Action Taken by Program Manager with Service Provider</b>	<b>Time Frame of Lockout</b>
<b>Examples of Failure</b>	<b>Proposed Action Taken by Program Manager with Service Provider</b>	<b>Time Frame of Lockout</b>
<b>Strike 3: Inexplicable Offenses</b>		
<ul style="list-style-type: none"> <li>• Fraud-related failures.</li> <li>• Creating and/or exposing a customer(s) to an unsafe condition(s).</li> <li>• Noncompliance to any prior corrective actions.</li> </ul>	<ul style="list-style-type: none"> <li>• Meet/counsel with SP to explain failures and explore the reasons the offense(s) may have occurred.</li> <li>• Describe offenses for management and obtain approval to proceed with termination.</li> <li>• Create termination letter and have legal review and approve.</li> </ul>	<ul style="list-style-type: none"> <li>• SP is locked out immediately and terminated in system once management and legal approve.</li> <li>• Termination letter is sent to SP and umbrella contract is canceled.</li> <li>• SP should be terminated in EEPM and not allowed to participate in any current and/or future Oncor energy efficiency programs.</li> </ul>

### Strike Examples by Measure Type

<b>Measure Description</b>	<b>Strike 1 Examples</b>	<b>Strike 2 Examples</b>	<b>Strike 3 Examples</b>
<b>HVAC</b>	<ul style="list-style-type: none"> <li>• Wrong serial and/or model numbers reported.</li> <li>• Wrong size of equipment reported.</li> <li>• Missing/wrong photos</li> <li>• Wrong heating system type reported</li> </ul>	<ul style="list-style-type: none"> <li>• Equipment reported installed is different from actual installed equipment.</li> <li>• Valid customer complaint.</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple and repeated offenses occur.</li> <li>• SP turns in house(s) with no installed equipment.</li> <li>• SP impacted the customer and/or the program in an egregious manner.</li> </ul>
<b>Ceiling Insulation</b>	<ul style="list-style-type: none"> <li>• Wrong heating system type reported.</li> <li>• Wrong square footage reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Sloppy and/or incomplete work.</li> <li>• Pre- and/or post-insulation levels are different from what is reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple and repeated offenses occur.</li> <li>• SP turns in house(s) that have not had insulation installed.</li> </ul>

Measure Description	Strike 1 Examples	Strike 2 Examples	Strike 3 Examples
	<ul style="list-style-type: none"> <li>Pre- and/or post-insulation levels are different from what is reported on paperwork but actual install is OK.</li> </ul>	<ul style="list-style-type: none"> <li>Valid customer complaint.</li> <li>Square footage is reported wrong more than one time.</li> </ul>	<ul style="list-style-type: none"> <li>SP impacted the customer and/or the program in an egregious manner.</li> </ul>
<b>Wall/Floor Insulation</b>	<ul style="list-style-type: none"> <li>No pre-inspection was possible.</li> <li>Wrong heating system type reported.</li> <li>Wrong square footage reported.</li> <li>Pre- and/or post-insulation levels are different from what is reported on paperwork but actual install is OK.</li> </ul>	<ul style="list-style-type: none"> <li>No pre-inspection was possible multiple times.</li> <li>Pre- and/or post-insulation levels are different from what is reported.</li> <li>Sloppy and/or incomplete work.</li> <li>Valid customer complaint.</li> <li>Square footage is reported wrong more than one time.</li> </ul>	<ul style="list-style-type: none"> <li>Multiple and repeated offenses occur.</li> <li>SP turns in house(s) that have not had insulation installed.</li> <li>SP impacted the customer and/or the program in an egregious manner.</li> </ul>

**Definitions and Acronyms:**

Egregious	conspicuously and outrageously bad or reprehensible
Failure rate	cumulative lockout failure rate calculation is as stated below: (Total Adjusted Incentive Dollars for Failed Inspected Measures ÷ Total Requested Incentive Dollars for Inspected Measures) X 100)
Inexpiable	incapable of being atoned for
EEPM	energy efficiency program management
HEE	home energy efficiency
LIW	low-income weatherization
PM	program manager
PR	production report
SP	service provider

**9.5 Impact of Prior-Year Performance**

Performance during prior years is considered in service provider management. The table below provides examples of the actions that can be taken by the program manager if a service provider with past performance issues applies to participate in a residential energy efficiency program. All exceptions will be reviewed at the discretion of Oncor.

**Impacts of Past Performance**

Applicant Issue	Program Action	Comments
CFR is greater than 10% or insurance was discontinued	Lockout for the current program year	SP shall develop a plan of action to address failures/issues, to be presented when applying to participate during the following program year.

		<p>Potential modifications may be considered based on the cause of the past failures:</p> <ul style="list-style-type: none"> <li>• CFR due to paperwork: one-month lockout period.</li> <li>• CFR due to inferior work: three-month lockout period.</li> </ul>
CFR is greater than 5% but less than 10%	One-month lockout period following approval date	Lockout period is subject to adjustment, based on the cause of the CFR.
Issues identified during internal compliance audit, including non-retention of paperwork or lack of employee background checks	Three-month lockout period	Lockout period will vary based on issue discovered during audit.
Service provider had a "Strike 1" status at the end of the prior program year	One-month lockout period following approval date	<p>Lockout period is subject to adjustment, based on the cause of the CFR:</p> <ul style="list-style-type: none"> <li>• Five paperwork errors will result in service provider lockout.</li> <li>• Lockout will not be waived for failures due to work quality.</li> <li>• Lockout will not be waived in the case of other issues outlined in the Strike 3 Policy.</li> </ul>
Service provider had a "Strike 2" status at the end of the prior program year	Two-month lockout period following approval date	<p>Lockout period is subject to adjustment, based on the cause of the CFR:</p> <ul style="list-style-type: none"> <li>• Five paperwork errors will result in service provider lockout.</li> <li>• Lockout will not be waived for failures due to work quality.</li> <li>• Lockout will not be waived in the case of other issues outlined in the Strike 3 Policy.</li> </ul>

## 9.6 Audit and Records

According to Texas Business and Commerce Code §35.48, businesses that dispose of records containing personal information must destroy or modify the record through shredding or other means that renders the information unreadable.

Personal information consists of the customer's name and any one of the following:

- Customer identification number (premise number, meter number, and/or ESIID)
- Social Security number (or government identification number)
- Driver's license number
- Address (physical or mailing)

## 9.7 PERMITS, LICENSES, AND COMPLIANCE WITH LAW

- SP represents and warrants that prior to beginning installation of any Measures, it will obtain, at its own cost and expense, all permits, licenses, and other authorizations from governmental authorities in its business name as then may be required to install, construct, operate, and maintain the Measures and to perform its obligations hereunder. During the term hereof, SP will obtain all such additional governmental permits, licenses, and other authorizations when required with respect to any of the Measures. If requested by Oncor, SP shall furnish to Oncor copies of

each such permit, license, or other approval promptly following receipt thereof. Service Provider shall maintain in full force and effect all such governmental permits, licenses, and other authorizations as may be necessary for the construction, operation, or maintenance of the Measures in accordance herewith.

- SP shall be responsible for all royalties, fees, or claims for any licensed, copyrighted, or similarly protected intellectual property, device, process, or procedure used, installed, or provided by it. SP shall defend any suit that may be brought against Oncor and shall hold Oncor harmless from any liability, damages, and costs, including without limitation attorney's fees, incurred by Oncor arising from or related to infringement or alleged infringement of any such intellectual property used by SP in the implementation of the Project.
- All Work performed by SP in connection with the implementation of the Project and all Measures installed or maintained by SP shall comply with all applicable laws, statutes, ordinances, rules, regulations, and decrees of any governmental or administrative body having jurisdiction over Oncor, SP, the HEE SOP, or any portion of the Project.
- Prior to entering any Project Site or beginning the installation of any Measures, SP will obtain, at its own cost and expense, criminal history background check(s) of its employees, vendors or agents if required to do so by Sections 145.001-145.003 of the Texas Civil Practice and Remedies Code. Background checks are acceptable only when performed through the Texas Department of Public Safety (TDPS) program or an approved vendor of the TDPS. SP acknowledges and agrees that its participation in the Program and execution of the HEE SOP Program Addendum serves as Oncor's request in accordance with Section 145.004 of the Texas Civil Practice and Remedies Code that SP obtain criminal history background checks of its employees, vendors, and agents. SP also acknowledges that it received this request prior to sending any persons to Project Sites to install Measures.

#### INDEPENDENT CONTRACTOR

- SP will act as and be deemed to be an independent contractor. SP will not act as, nor be deemed to be, an agent or employee of Oncor. SP will have the sole right to control and directly supervise the method, manner, and details of the Project providing it is in accordance with the Contract Documents.

## 9.8 Co-Branding Guidelines

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- SP will act as and be deemed to be an independent contractor. SP will not act as, nor be deemed to be, an agent or employee of Oncor. Service Provider will have the sole right to control and directly supervise the method, manner, and details of the Project, providing it is in accordance with the Contract Documents.
- SP may not represent themselves as Oncor employees in the field, nor should they communicate in any way that they work on behalf of Oncor. Oncor does not endorse any SP; therefore, written or verbal communication implying an endorsement is prohibited. Any reference to Oncor programs by SP should clearly state that the SP is a participant in Oncor's programs. Service Providers participating in programs will be listed on [www.takealoadofftexas.com](http://www.takealoadofftexas.com).
- Following is sample language SP can use when communicating their relationship with Oncor.

George's Energy Solutions is participating in Oncor's Home Energy Efficiency Standard Offer Program. Through this program, we are able to install energy efficiency upgrades to help our customers reduce energy consumption.

## 10 INSTALLATION MEASURE GUIDELINES

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### **Air Conditioning and Heat Pump Systems**

Installation must meet the following guidelines:

- Pictures of the manufacture plate of the existing furnace and condenser will be uploaded to the measure with replacement of all air conditioning and heat pump systems.
- The model and serial number for the new system will be required entries in EEPM when submitting these measures along with photo of the new equipment nameplate.
- A photo on the new installed condenser unit that is recognized next to the dwelling.
- A copy of the AHRI sheet is required for each newly installed system.

### **Wall Insulation**

Installation must meet the following guidelines:

- The service provider may not install wall insulation unless the wall area to be treated has been pre-inspected by Oncor. Failure to pre-inspect will result in a failure.
- The insulation applied must be R-13 or higher. Only exterior walls should be treated.
- There must be no preexisting insulation.
- If insulating under a drywall patch, you must report the correct dimensions of the patch and the correct wall area (square footage) treated with insulation.
- The method of installation of the wall insulation must be reported (blown or other) to Oncor.

### **Ceiling Insulation**

Insulation improvements to the ceiling area above a conditioned space are only eligible for residences with central air cooling and/or heating systems. Homes with window air conditioning and/or space heating are not eligible.

Existing ceiling insulation in participating homes, ranging from no insulation material (R-0) to the equivalent of about 6 inches of fiberglass batt insulation (R-22). The current average ceiling insulation level at participating homes is to be determined and documented by the insulation installer.

Degradation due to age and density of the existing insulation should be taken into account.

In the event that existing insulation is or has been removed during the measure implementation, the existing R-value for claiming savings shall be based upon the R-value of the existing insulation prior to removal.

A ceiling insulation level of R-38 is recommended throughout Texas as prescribed by the U.S. Department of Energy. Accordingly, deemed savings are provided for insulating to R-38. Adjustment factors are provided to allow contractors to estimate savings for installation of higher or lower levels of post-retrofit insulation: contractors should estimate post-retrofit R-value according to the average insulation depth achieved across the area treated and the R-per-inch of the insulation material installed.

## 10 ELIGIBLE MEASURES AND INSTALLATION CRITERIA

### HOME ENERGY EFFICIENCY STANDARD OFFER PROGRAM ELIGIBLE MEASURES AND INSTALLATION CRITERIA

#### CONTROL INTERIOR ENERGY USAGE

MEASURE	MATERIAL	MINIMUM CRITERIA FOR INSTALLATION
<b>Insulation</b>	Mineral fiber (blanket)	<ul style="list-style-type: none"> <li>• Conforms to ASTM C665-98</li> <li>• Conforms to ASTM C764-98</li> <li>• Conforms to ASTM C739-97</li> <li>• Conforms to ASTM C1149-97</li> <li>• Conforms to ASTM C516-80</li> <li>• Conforms to ASTM C549-81</li> <li>• Existing ceiling insulation of R-22 is in compliance with the program</li> <li>• Added ceiling insulation above R-22 must be installed to R-38 in compliance with deemed savings standards</li> </ul>
	Mineral fiber (loose fill)	
	Cellulose	
	Vermiculite (loose fill)	
	Perlite (loose fill)	
<b>Insulating R-Values</b>	Walls	<ul style="list-style-type: none"> <li>• Install to R-13</li> <li>• Install to R-19</li> <li>• Install to R-15</li> </ul>
	Knee wall	
	Floor (pier and beam)	

#### CONTROL HVAC EFFICIENCY

MEASURE	MATERIAL	MINIMUM CRITERIA FOR INSTALLATION
<b>HVAC</b>	Packaged units	<ul style="list-style-type: none"> <li>• Must comply with deemed savings and installation standards</li> <li>• Must comply with deemed savings and installation standards</li> <li>• 12 EER or greater required for all new systems</li> <li>• 8.5 HSPF or greater</li> <li>• Units must have a minimum cooling capacity of 1.5 tons or less than 65,000 Btu/hour (5.4 tons) to be eligible</li> <li>• "Running" requires a picture of the condenser label the customer acknowledging the old system was working at the time it was replaced</li> <li>• New Construction - Only 18+ SEER systems are eligible</li> </ul>
	Split system	
	Mini Split	
	DC Invertor	