

ONCOR
TAKE A LOAD OFF, TEXAS

WELCOME

COMMERCIAL LOAD MANAGEMENT PROGRAM PRESENTATION

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HOW TO PARTICIPATE

Overview of Commercial Programs

Commercial Programs

- Incentives provided for qualifying peak demand and/or energy saving projects:
- Eligible commercial customers with demand ≥ 50 kW can self-sponsor
- Programs include Commercial Load Management (CLM) Standard Offer Program (SOP), Commercial SOP, Solar Commercial SOP, Small Business Direct Install Program, and HVAC Midstream Program

Program Qualifications

Service Providers and Self-Sponsors can apply to receive incentives for eligible projects.

- Service Providers and Aggregators include:
  - National or local energy service companies
  - Retail Electric Providers
  - Individual customers that meet Program requirements

- Customers must be served by Oncor and pay into the Energy Efficiency Cost Recovery Fund

- Due to opt-out provisions, **transmission level, for-profit** customers are excluded from the Program

Program Information

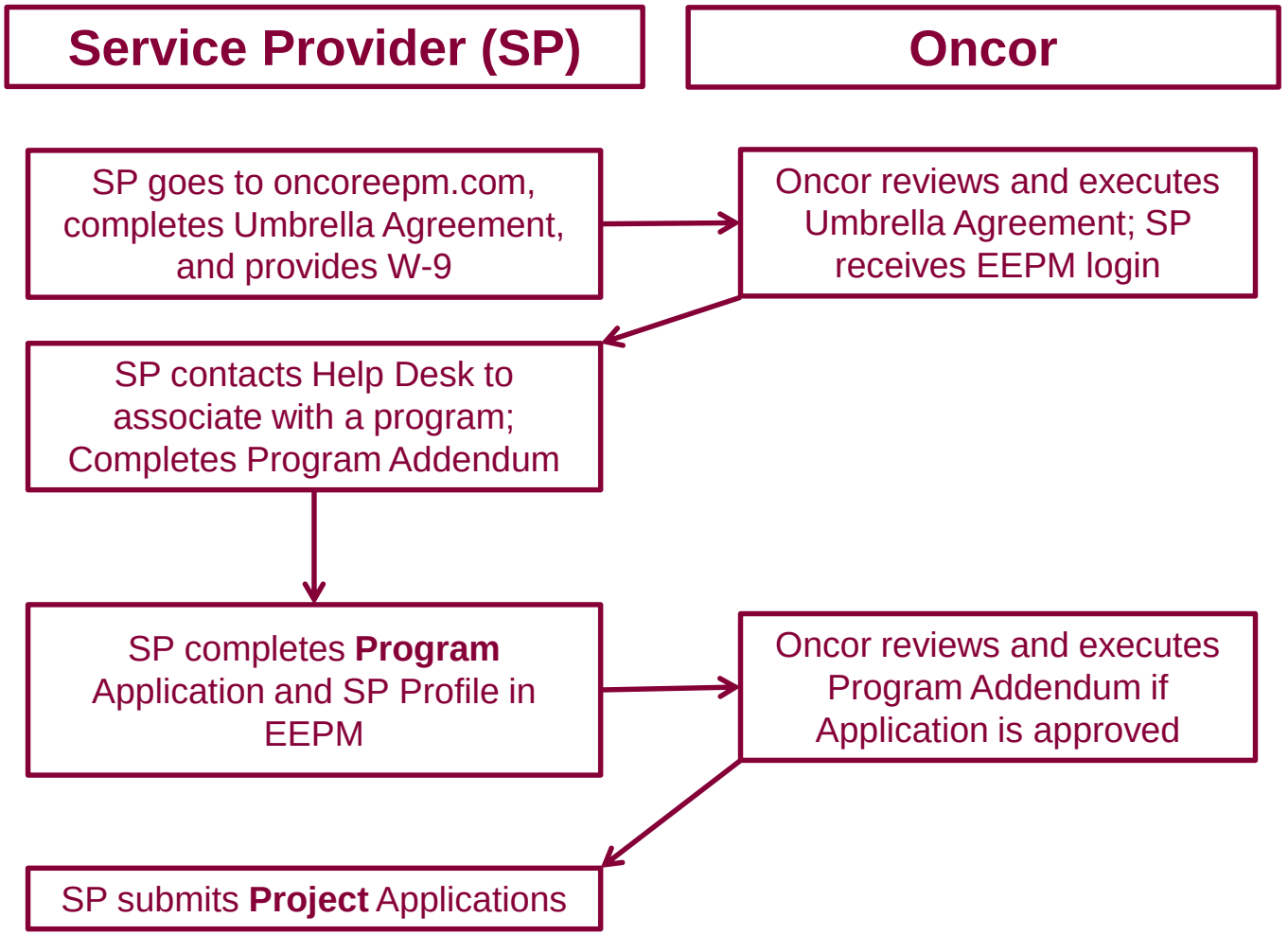
Looking for additional information?

Visit eepm.oncor.com

- How to Become a Service Provider
- Program manuals and other helpful resources
- The State of Texas Technical Reference Manual (TRM)



How to Enroll as a Service Provider



Umbrella Contract and W-9

Umbrella Agreement must be completed first!

- New to the programs? Visit oncoreepm.com and sign up.

- Issues? Contact the EEPM Help Desk at 866-258-1874 or at eepmsupport@oncor.com.

Service Providers must attach a completed W-9 in EEPM

- The company name on the W-9 must match the company name listed in EEPM

- Incentives can only be paid to Service Providers listed in EEPM.

- Existing Service Providers are required to keep their company information up to date in EEPM. If a company name, mailing address, or Taxpayer Identification Number has changed, please contact the Program Manager.

EEPM Access

Login, Security Question and Password

- Upon Umbrella Agreement approval, login information is provided
- Log into EEPM, select the Profile tab and set your security question and password
  - Document your security question and answer; you will need it to reset your password every 90 days

Program Application

Applying for Specific Energy Efficiency Programs

- Program Opening
- Contact the Help Desk and ask to be associated with programs of interest
- Log into EEPM and complete applicable program applications



Hi, could you please associate my company to the 2022 CLM Program?

EEPM Help Desk

Who To Contact With Questions

- Always start with the EEPM Help Desk
- By phone 866-258-1874
- By email eepmsupport@oncor.com

- If insurance is required for program participation, insurance questions can be addressed to eepminsurance@oncor.com.

- Insurance is not required for the Commercial Load Management (CLM) Program.

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2022 COMMERCIAL LOAD MANAGEMENT (CLM) PROGRAM

Commercial Load Management Program Team

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CLM Program Description

- Oncor pays incentives to Service Providers for the curtailment of electric consumption on thirty minute notice during the Peak Period.

- For CLM, Oncor defines the Peak Period as the hours occurring between 1 p.m. and 7 p.m., June through September, excluding weekends and federal holidays.

- Incentives are based on verified demand savings that occur at an Oncor commercial distribution customer's site as a result of a curtailment.

Definitions

- **Curtailment:** Decreasing the demand usage at one or more project sites during the Peak Period at the request of Oncor pursuant to the program.

- **Performance Period:** The timeframe in which an unscheduled curtailment may be called. This period is from June 1 through September 30, inclusive of the hours from 1 p.m. to 7 p.m. Monday through Friday, excluding federal holidays.

- **Project:** The total number of IDR or advanced meter numbers for project sites that are submitted in EEPM by a Service Provider pursuant to its participation in the program.

- **Service Provider:** Any aggregator, electrical service company, or end-use customer with electric demand greater than or equal to 50 kW that executes an Umbrella Agreement and Program Addendum.

2022 CLM Budget and Goal



BUDGET	GOAL	$/kW
$2,000,000	66,667 kW	$30.00

2022 CLM Program Budget, Incentive Limits, and Contract adjustments

Program Budget

- Oncor reserves the right to adjust the program incentive budget and goal at any time at its sole discretion.

Incentive Limits

- Participants and their affiliate companies are limited to 20% of the annual program budget, unless modified by Oncor management, and the total program incentives are capped. If the program reaches its program-wide incentive cap, individual participant incentives will be modified in proportion to demand savings achieved.

Project Approval and Contracting

- Based on the program budget and other needs, Oncor reserves the right to adjust participant's requested amount of demand savings and incentives.

2022 CLM Program Schedule

- When the Program opens, Applicants may begin completing and submitting Program Applications at that time. After being approved for the Program, Participants will be able to begin preparing Projects.

- Although Participants may create and edit projects in EEPM, project submittal will be disabled until the project submittal date. When EEPM opens for project submittal, projects will be assigned to a wait-list based on the order that they were received.

- Participants are encouraged to have their Program Application approved by Oncor and their Project(s) ready for submittal before the project submittal date.

Program Schedule Details

• EEPM available for submitting Umbrella Contract and W-9	March/April
• EEPM available for submitting CLM Program Application with a signed Program Addendum • After Oncor approves Application, EEPM available to enter Projects	April 1, 10 am CT
• **EEPM opens to submit Projects** • All Projects will be placed on Waitlist • No addition or removal of meters after Project submittal • Any Project submitted prior to 10 am on April 28th as shown by EEPM will be rejected or cancelled	**April 28, 10 am CT**
• EEPM closes for Project submittal	May 6, 5 pm CT
• Oncor provides information on Scheduled Curtailment Event	May/June
• Scheduled Curtailment Event	May/June
• Oncor notifies Service Providers (SPs) of Project status • Project Approval and Contracting Period	June/July
• Performance Period	June 1 thru Sept 30

PROGRAM REQUIREMENTS

Program Details

- Participants must commit Curtailable Load to the Program during the Peak Period for each premise
- There will be a three-hour Scheduled Curtailment Event in May or June
- Program may have Called Curtailment Events of one to four hours in duration, not to exceed 25 hours of total curtailment during the Peak Period
- Program is pay-for-performance
- Meters/customers participating in ERCOT or other demand response programs are ineligible for the Oncor CLM Program

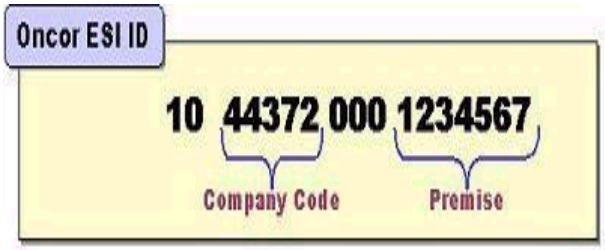
Project Details

- Each Service Provider may submit multiple projects up to the 20% cap.
- Minimum of 100 kW curtailment performance is required.
- Each meter must have a minimum summer Peak Demand of 50 kW.
- Once a project has been submitted, site and meters cannot be added.
- **Participants are responsible for ensuring compliance with applicable federal, state, and local laws and regulatory requirements, including environmental rules on the use of backup or emergency generators.**

Customer Eligibility

- All participating customer accounts must be served by Oncor, be a commercial account, and have an Interval Data Recorder (IDR) or advanced meter (AMI) on each account.

- Oncor customer account numbers (ESI IDs) contain one of the following company codes: The last seven digits are the premise (account) number or meter number in EEPM.



Found throughout the service area



Found in East Texas

NOTE: Check the premise ID in EEPM to verify the rate code. Customers that have a “Commercial” rate code and contribute to the Energy Efficiency Cost Recovery Fund are eligible. Transmission level, for-profit customers are not eligible to participate.

Service Provider Responsibilities

Execute Program Addendum

- Complete Umbrella Agreement
- Complete Program Application and executed Program Addendum
- Curtail load during the Scheduled Curtailment Event when notified by Oncor
- Monitor their Project(s) during the Scheduled Curtailment Event and maintain the curtailed load for the duration of the Curtailment (three hours)

Execute a Reservation of Funds

- Curtail load during any Called Curtailment Events when notified by Oncor
- Monitor their Project(s) during Called Curtailment Events and maintain the curtailed load for the duration of the Curtailment (one-hour minimum and four-hour maximum)
- Approved Projects must have an executed Reservation of Funds

Oncor Responsibilities

Enroll in the Program

- Verify load curtailed during Scheduled Curtailment Event
- Prepare and Execute a Reservation of Funds Agreement

Execute a Reservation of Funds

- Perform the Verification Process for Called Curtailment Events to measure the Demand Savings after each curtailment
- Make a payment (the Performance Period Payment) based on verified Demand Savings related to Called Curtailment Events after the end of the Performance Period
- Payments usually made within 60 days after close of the contract period

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INCENTIVES

Scheduled and Called Curtailment Events

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Service Providers with an approved Reservation of Funds Agreement:

- Contracted amount is based on either the Service Provider's performance during the Scheduled Curtailment Event or the Requested Demand Savings, whichever is lower.
- Based on the program budget and other needs, Oncor reserves the right to adjust participant's requested amount of demand savings and incentives.
- Awarding of the contracted amount is governed by the waitlist process and all terms stated in the program manual.
- Called Curtailment Events are triggered during, or in anticipation of an ERCOT Energy Emergency Alert (EEA) Level 2 event or to assure Oncor grid stability.

Performance Period Payment

- The Performance Period Payment is a premise's average demand savings for all events, not to exceed the Contracted Demand Savings
- Demand savings will be calculated in accordance with the Texas Technical Reference Manual in effect during the 2022 program year
- If there are no Called Curtailment Events, the Performance Period Payment will be based on the Service Provider's verified Contracted Amount of Demand Savings for each Project

Called Curtailment Events

Projects that perform greater than 100% of their contracted amount:

- May receive up to $30.00/kW* for over-performed Demand Savings contingent upon program budget
- Provided only if there are underperformers and Oncor is under budget
- Payment will be the remaining incentive divided by the number of kW over contract for all participants
- Over-performance payments are optional and Oncor reserves the right to cancel the over-performance payment based on program performance and portfolio needs

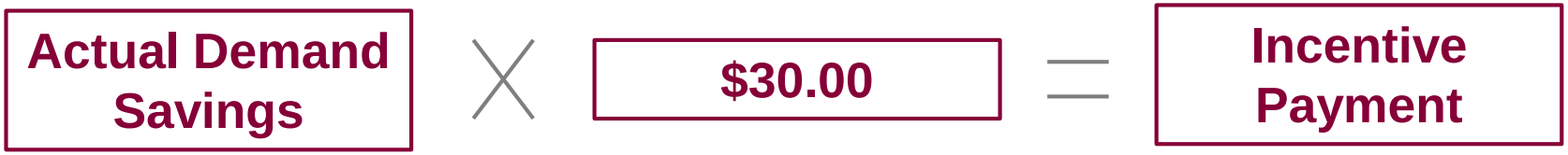
**Funds only available if there are Service Providers who underperform and the total cost of the Program portfolio is less than $30/kW for Reportable Demand Savings*

VERIFICATION AND INCENTIVE PAYMENT

Verification Process

- Performance is verified by analyzing actual 15-minute usage data from Oncor AMI or IDR meters
- If actual meter data is not available for a site during a Scheduled or Called Curtailment Event, including any associated baseline days, Oncor reserves the right to remove the site from the Program
- Demand savings are calculated at the site level and summed to the project level
- Any sites having load growth during the event will negatively impact the project savings

Incentive Calculation



- Oncor will calculate the final Demand Savings and incentive after the Performance Period is over
- Incentive is estimated to be awarded in October 2022

Contact Information

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Insurance questions: eepminsurance@oncor.com



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