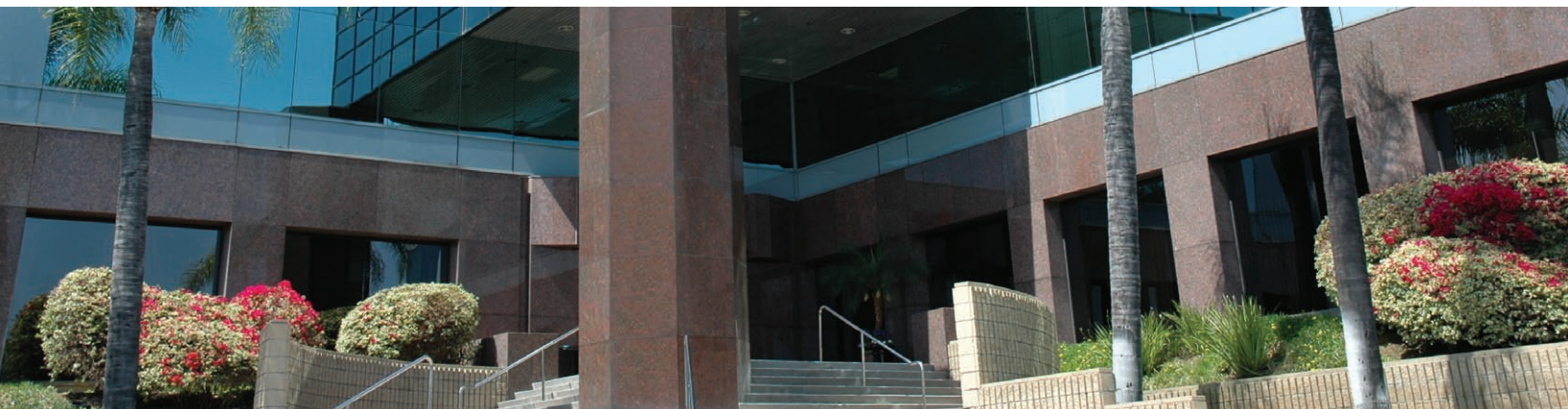


Commercial Retrocommissioning (RCx) Program Overview



Improve overall building performance and save



Retrocommissioning your building for savings

The SCE Commercial Retro-commissioning (RCx) Program operates in seven distinct phases:

- **Project Start**
- **Screening**
- **Scoping**
- **Agreement Development**
- **Investigation**
- **Implementation**
- **Follow-Up**

Each phase has key deliverables and milestones identified by the Program to ensure successful execution of the retrocommissioning of each building.

Project Start (1 week)

The first step to participate in the Program is to fill out SCE's Retrocommissioning **Program Application**. The Application gathers general information to help establish candidacy and presents the general requirements for eligibility. The owner must also submit information regarding the building's ENERGY STAR® Portfolio Manager (ESPM) account.

Candidate Screening (1-2 weeks)

The screening generally takes one to two weeks to complete from receipt of the Application, depending on the size and complexity of the facility. A Screening Form will be produced to establish the building's eligibility for the Program.

If the screening finds adequate retrocommissioning opportunities to continue forward in the Program, the Owner will be asked to select an SCE-approved RCx Provider to conduct the scoping. If retrocommissioning opportunities are not found, the Owner receives notice and referrals to other SCE programs for which they may be eligible.

Candidate Scoping (2-4 weeks)

Scoping entails inspecting the building and its equipment, analyzing the building's past energy usage, and identifying any preliminary findings that should be further investigated during the RCx Investigation phase of the Program. The RCx Provider will prepare a Scoping Report which contains a list of preliminary measures discovered during the scoping phase.

If the scoping finds adequate and cost-effective retrocommissioning opportunities in the building, the Owner proceeds to Agreement Development. If the building is not selected to continue in the RCx Program, the Owner receives notice and referrals to other SCE programs for which they may be eligible.

Agreement Development (2-4 weeks)

Once accepted, the Owner is required to sign SCE's **Retrocommissioning Owner Program Agreement (OPA)**, confirming an understanding of and agreement to the Program's requirements, terms, conditions, and process, and Owner's obligation to proceed with the RCx Investigation. The OPA will set forth the incentive levels for RCx measures having a payback of greater than one year available to eligible Owners as well as the incentive levels for RCx Providers (Investigation costs and follow-up). The Owner must further agree, at Owner's cost, to implement all RCx measures identified during the RCx Investigation that have a payback of one year or less (subject to a dollar cap) or otherwise be obligated to reimburse SCE for the

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RCx Investigation costs. The RCx Provider is issued a *Contractor Work Assignment*, which outlines the RCx Provider's commitment and obligations for the project.

Retrocommissioning Investigation (12-16 weeks)

During the investigation, the RCx Provider conducts a rigorous analysis of the building operations. The RCx Provider then determines opportunities for corrective action and other operational and maintenance improvements that reduce energy consumption and demand and records them in the Program's Findings Workbook.

The results of the RCx investigation are summarized in the *Master List of Findings*. The RCx Provider presents the *Master List of Findings* in a meeting with the Owner and SCE Program Representative. The RCx Provider and Program Representative assist the Owner in selecting measures that have the greatest energy savings opportunities and best meet Owner's needs and budget. An **Incentive Application and Agreement** which sets forth the estimated amount that Owner will receive in incentives for recommended measures that pay back in greater than one year.

The final package of improvements is presented to the Owner in the *RCx Draft Final Report*. The *Draft Final Report* is a narrative report detailing information from the *Master List of Findings* which includes the selected measures for implementation, the cost, the energy savings and payback calculations, and recommendations for implementation. Upon timely completion of the deliverables, the RCx Investigation incentive is paid directly to the RCx Provider, 50%



SCE's Retrocommissioning Program (RCx) is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission, through contracts awarded to qualified RCx providers. Customers who choose to participate in this program are not obligated to purchase any additional services offered by the contractor.

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upon completion and approval of the *Master List of Findings* and the remaining portion upon submission and approval of the *RCx Draft Final Report*.

Implementation (12-20 weeks)

Using the *RCx Draft Final Report* for implementation, the Program allows flexibility in how the Owner wishes to implement the selected measures.

A portion of the RCx Provider's follow-up incentive is designed to assure that the RCx Provider is available to answer Owner or contractor questions regarding measures being implemented and to verify measures, update savings calculations, and produce the *Implementation Summary Table*. Specifically, the tasks include:

- Prior to work starting, review the contractor bids ensuring that the contractor scopes of work adequately reflect the intent of the original recommendations and include verification of performance sufficient to meet the Program's requirements. If needed, answer questions that arise during implementation, and provide clarification or advice on measures being implemented.
- Provide regular updates to SCE via email regarding the status of each measure
- If needed, attend implementation progress meeting(s)
- Verify completion of each measure and update Findings Workbook including final savings, costs, and payback calculations to produce the *Implementation Summary Table* (included in the Findings Workbook).

Upon SCE's approval of the *Implementation Summary Table* and after a final inspection has

been conducted by SCE verifying installation of all required and selected RCx measures, SCE will pay the implementation incentive payment to Owner (or its designee) and the RCx Provider receives 50% of the follow-up incentive payment.

Follow-Up (2-4 weeks)

After implementation, it is essential for the building owner and operators to have the resources they need to ensure that the retrocommissioning savings persist over time. The Program's protocols provide consistent methods for documenting all RCx measures.

The base persistence plan for each facility shall contain the following minimum elements:

Targeted Documentation: The RCx Provider is responsible for developing an *RCx Final Report* describing the implemented measures, including: new or improved sequences of operation; the energy savings impact of the measures; the requirements for ongoing maintenance and monitoring of the measures; and contact information for the RCx Provider, in-house staff or contractors responsible for implementation.

Training: Before handing over the targeted documentation, the RCx Provider and contractors provide follow-up training for the Owner and the appropriate building operations personnel on the new documentation and implemented measures. The training covers the measures that were implemented and requirements for ongoing maintenance and monitoring.

Upon receipt and approval of the *RCx Final Report*, the RCx Provider receives the final 50% of the follow-up incentive payment.

