



FY27 SRP Business Solutions Custom Program Manual

May 1, 2026

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1.1 PROGRAM OVERVIEW

The SRP Business Solutions Custom Program provides a comprehensive platform for cost-effective non-residential energy efficiency projects not addressed by the SRP Business Solutions Standard Program. One of the primary goals of the program is to obtain quantifiable, cost-effective, and persistent electrical energy savings that result from the installation of energy efficiency measures.

Equipment rebates result from the submission of an application which is reviewed and approved in writing by SRP. These rebates become available after measure benchmarking, installation, and commissioning by the customer. Rebates are paid at \$0.11 per kilowatt-hour for the first year of energy savings once the project is installed and savings verified by SRP, and are capped at 75% of the customer's eligible project incremental cost. Projects that may not yield any kWh savings will be reviewed on a case-by-case basis to determine eligibility before rebate application preapproval will be issued.

In addition to equipment rebates, service rebates in the form of energy assessments co-funded by SRP are available. Under the program, customers who meet specific eligibility criteria would qualify to receive energy efficiency assessments. The primary goal of these energy assessments is to provide SRP customers with sound technical and financial evaluation of the potential electric energy savings opportunities available within their facilities. All assessments are limited to one per customer, per program year, which runs from May 1st through April 30th of each year.

There are two phases in the energy assessments that are offered under the program: a Preliminary Assessment and a Technical Assessment. The Preliminary Assessment is offered to customers with eligible compressed air and pumping systems, data center space, or with certain eligible price plans. Customer eligibility and Preliminary Assessment funding are detailed further in Sections 3 and 4 of this manual.

Once a Preliminary Assessment has been completed and/or with written approval from the Program Administrator, the customer may choose to apply for a Technical Assessment. The Technical Assessment is a continuation of the Preliminary Assessment and provides specific measure details and estimates of costs, energy savings, and economic investment criteria. The Technical Assessment is co-funded by SRP at 50% of the cost, up to \$15,000. For customers who have completed a Technical Assessment and implemented the recommended measures identified in the approved Technical Assessment report, SRP will reimburse the remaining 50% of the Technical Assessment cost, up to \$15,000, upon verification of the implemented measures' savings (hence under the program, up to \$30,000 of service rebate is available to offset customer's cost for an SRP funded Technical Assessment).

Circumstances that may indicate an energy savings opportunity include:

- Unusually high energy bills when compared to similar buildings,
- Old equipment or inadequate controls,
- Frequent occupant comfort complaints, or
- High and/or recurring maintenance costs.

Customers are advised to review the comprehensive suite of SRP's program offerings to identify the most appropriate offering to meet their needs. A brief overview of available program offerings is presented in Appendix A of this manual. All program questions can be directed to the Program Administrator.

1.2 CONTACT INFORMATION

SRP has retained Resource Innovations as the Program Administrator for the SRP Business Solutions Custom Program. Questions about the program can be directed to the Program Administrator via:

- Web
 - www.savewithsrpbiz.com
- Telephone
 - Customer informational hotline: (602) 236-3054
 - Qualified Service Provider direct line: (602) 236-1611
- Fax - (480) 345-7601
- Email
 - Customer inquiries: savewithsrpbiz@srpnet.com
- Mail

SRP Business Solutions Custom Program
3100 W Ray Rd, Ste 230
Chandler, AZ 85266

1.3 MANUAL USE AND ORGANIZATION

This program manual is designed for use by customers, contractors, architecture, and engineering firms, energy services companies, and equipment manufacturers and outlines the rules and requirements of the SRP Business Solutions Custom Program. The manual is organized as follows:

- Section 2 – Alliance Participant
- Section 3 – Addresses customer, measure, and cost eligibility requirements
- Section 4 – Discusses rebate information
- Section 5 – Outlines program participation steps
- Section 6 – Summarizes representative commissioning protocols

Sample program submittal forms, frequently asked questions, and other general program support information are contained in appendices at the end of this manual.

1.4 PROGRAM DATES

The FY27 SRP Business Solutions Custom Program runs from May 1, 2026, to April 30, 2027. As explained further in Section 5.2, all qualifying custom measures, except new construction and end-of-useful life replacement measures, require preapproval from SRP **before** purchase or installation, and measures are not rebate-eligible if purchased or installed before receiving preapproval..

Project applications that involve "installations of energy-efficient equipment for new facility or new manufacturing process line", and/or "replacements of existing end-of-useful life equipment" and purchased between May 1, 2026, and April 30, 2027, must be received no later than October 31, 2027, to be eligible for rebates under the FY27 program guidelines (subject to rebate availability).

2.1 ENERGY EFFICIENCY ALLIANCE (EEA) PARTICIPANTS

As a convenience to customers, SRP provides a list of contractors, distributors, manufacturers, and other organizations (Alliance Participants) who may assist customers with SRP programs. Alliance Participants are independent contractors for the program, and are not authorized to make representations or incur obligations on behalf of SRP. Participation as an Alliance Participant does not constitute an endorsement by SRP, nor does it certify or guarantee the quality of work performed.

A listing of Alliance Participants with experience in identifying project opportunities is available online at www.savewithsrpbiz.com or by contacting the Program Administrator.

To be listed as an Alliance Participant, interested firms should submit an EEA application available on www.savewithsrpbiz.com or contact the Program Administrator at SRPeea@resource-innovations.com to request an application.

3.1 CUSTOMER ELIGIBILITY

For SRP's energy efficiency programs, a customer is defined as a company or organization that receives electric service from SRP under an approved SRP price plan. A customer is a holder of a single account, multiple accounts in aggregate or corporate accounts. A customer who is the holder of multiple accounts or corporate accounts with a single SRP customer identification number will be considered a single customer and may participate in multiple SRP programs subject to rebate caps and program requirements.

To participate in the SRP Business Solutions Custom Program (Custom Program), a customer must install qualifying measures in an SRP-served facility on a qualifying SRP non-residential retail electric price plan. Table 3.1 lists eligible customer price plans.

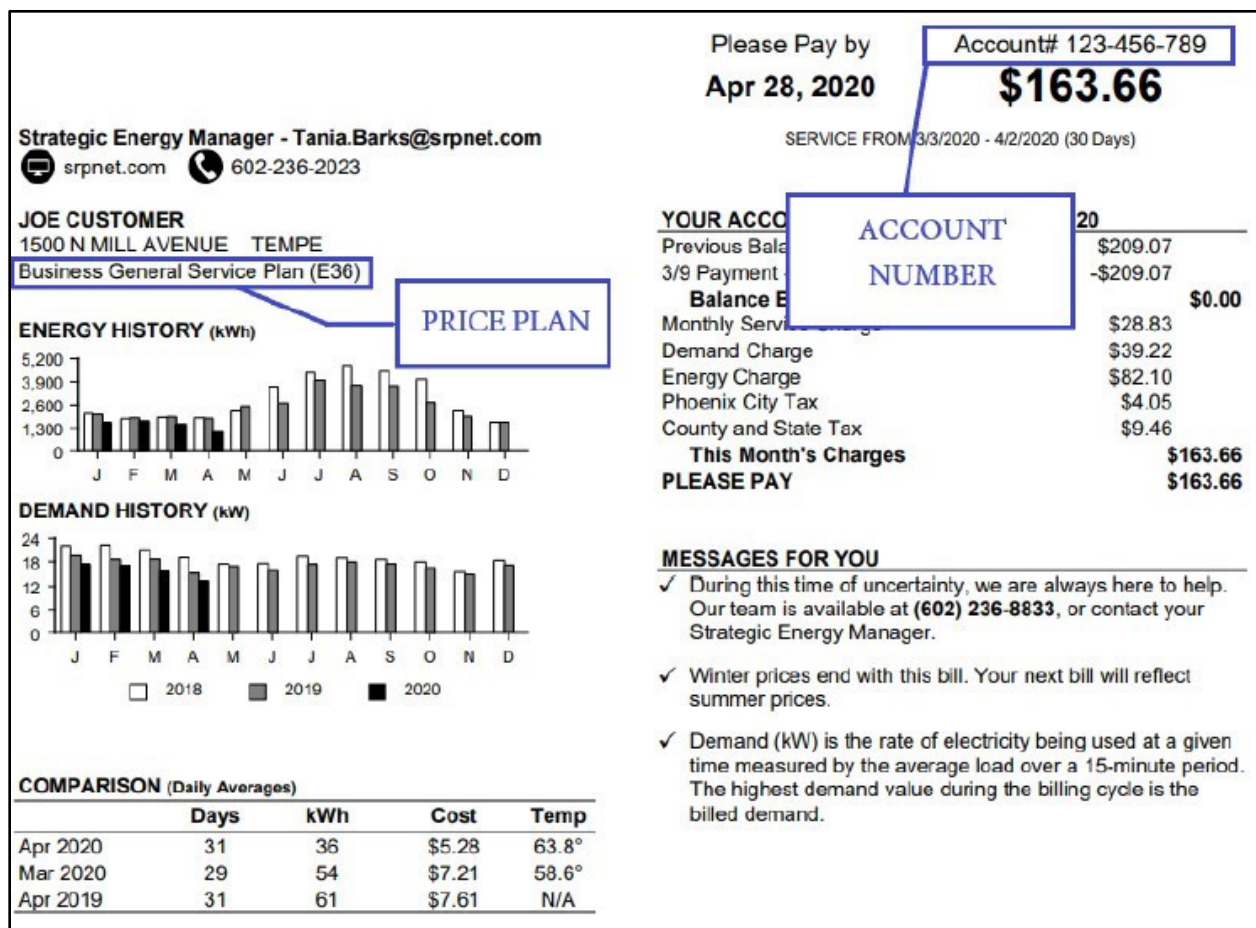
Table 3.1: Eligible Price Plans for SRP Business Solutions Custom Program

Description	Price Plan
General Service	E-31
Time-of-Use General Service	E-32
Experimental Price Plan for Super Peak Time-of-Use General Service	E-33
M-Power for Pre-Pay General Service	E-34
Standard General Service	E-36
Standard Pumping Service	E-47
Time-of-Week Pumping Service	E-48
Standard Large General Service	E-61
Primary Large General Service	E-63
Substation Large General Service	E-65
Substation Large General Service with Interruptible Load	E-66
Large Extra High Load Factor Substation Large General Service	E-67

Customers can verify their price plan by looking at a recent bill.

Figure 3.1 shows where to find the price plan and account number on a typical SRP customer bill. Customers with questions regarding their account should contact the Program Administrator or their SRP Strategic Energy Manager.

Figure 3.1: Representative SRP Electric Bill



To receive service rebate assistance (for Preliminary Assessments & Technical Assessments) through the Custom Program, customers must meet one of the below eligibility criteria shown in Table 3.2.

Table 3.2: Qualifying Criteria for Technical Assistance

Assessment Type	Eligibility Criteria
Energy Efficiency Measure (EEM) Assessment	SRP Price Plan must be either E-61, E-63, E-65, E-66, or E67.
Compressed Air Assessment	Operational and active compressed air system greater than or equal to 100 HP (not including backup units or rental equipment, expectation for several days of data logging at Preliminary Assessment)
Data Center Assessment	Operational and active data center spaces of at least 1,000 Sq. Ft. with a dedicated cooling system.
Pump Test Assessment	Operational and active pumping systems for non-HVAC applications (municipal, agricultural, or industrial), with a motor greater than or equal to 25 HP (not including backup units or rental equipment).
Compressed Air Leak Assessment (only Preliminary Assessments available)	Operational and active compressed air system greater than or equal to 25 HP (not including backup units) and less than 100 HP
Energy Star Portfolio Manager Benchmarking	The facility building type must be a valid Energy Star Portfolio building type.
Demand Response Assessment	SRP Price Plan must be either E-61, E-63, E-65, E-66, or E67.

SRP retains the right, at its sole discretion, to make the final determination of customer eligibility.

3.2 MEASURE ELIGIBILITY

The Custom Program does not explicitly specify eligible measures to provide program participants maximum flexibility in identifying potential projects. Participants may propose the inclusion of any measure that:

- Provides quantifiable energy savings (when compared to a program-approved baseline).
- Is installed in a retrofit, end-of-useful life, or new construction application
- Is shown to be cost-effective as measured by the Total Resource Cost (TRC) test

Measures that are *excluded* from consideration in this program include those that:

- Are eligible for rebates through the SRP Business Solutions Standard Program
- Receive a rebate through any other energy efficiency program offered by SRP
- Rely solely on changes in customer behavior and require no capital investment
- Produce an electric energy reduction through substitution of another energy source for electricity
- Merely terminate existing processes, facilities, or operations
- Relocate existing processes, facilities, or operations out of SRP's service territory

- Are required by local, state, or federal law; building or other codes; or are standard industry practice
- Involve plug loads
- Generate electricity, including cogeneration or renewable energy generation

Examples of eligible measures are listed in Table 3.3. Program participants are free to propose measures not included in the table so long as the above requirements are met.

Table 3.3: Examples of Eligible Measures

- | |
|---|
| <ul style="list-style-type: none">▪ Constant air volume to variable air volume conversion in existing construction▪ Installations of VFDs on existing chillers, air compressors, or process equipment▪ Efficient manufacturing equipment exceeding industry-standard practices▪ Refrigeration efficiency improvements▪ Central plant upgrades/optimization, installation of waterside economizers▪ Building envelope improvements▪ Daylight harvesting controls▪ Controlled Environment Agriculture (CEA): Grow Lighting and HVAC-D▪ Compressed air system improvements▪ Pump system efficiency capital improvements |
|---|

SRP will review all measures for their eligibility and appropriateness to participate in the program. SRP retains the right to determine, at its sole discretion, eligible measures and reject applications or request additional information, as necessary.

3.3 ELIGIBLE MEASURE COSTS

The Custom Program is designed to encourage electric energy-efficiency improvements that go above and beyond the efficiency gains typically achieved in replacement projects. To be considered an eligible measure, customers must incur costs resulting from installing that measure which meet program criteria. Eligible measure costs are based upon the costs incurred by the customer in connection with the evaluation, construction, installation, implementation, and commissioning of an eligible measure.

The total costs associated with an eligible measure must exceed the costs of a comparable code-compliant measure as defined in ASHRAE 90.1-2016 and/or current industry standard practice. Only a customer's reasonable costs incurred to purchase and install eligible measures at the customer's facility, less any discounts, rebates other than those offered by SRP, or other considerations that reduce the actual cost incurred will be considered to establish a measure's eligible costs. A customer's internal labor costs are **not** eligible in determining a measure's eligible costs.

Customers shall cooperate by providing access to documentation and related systems as reasonably required for SRP to determine eligible costs. The customer must thoroughly document incremental material and external labor costs. Examples of acceptable documentation of eligible costs include invoices, work orders, canceled checks, and accounting system reports.

SRP reserves the right to determine, at its sole discretion, eligible costs for all affected measures, including adjusting costs for retrofit projects affecting measures significantly before the end of their useful life or for measures where codes and/or industry standard practices are not applicable.

4.1 REBATE MINIMUM, CAPS, AND AVAILABILITY

Rebate funding for the Custom Program is limited, and applications will be accepted on a first-come, first-served basis until all rebate funding has been committed. After that time, Customers will be given the option to be placed on a waiting list in the order requests were received by SRP. The current availability of rebate funds can be checked at www.savewithsrpbiz.com or by contacting the Program Administrator. Customers may reserve rebate funding for the project by submitting a Rebate Reservation Request before purchasing and installing eligible measures.

SRP's Business Solutions programs allow customers to participate in multiple programs subject to the rebate minimum and cap established by SRP. The minimum rebate amount per project is \$100. Therefore, the estimated rebate amount per project (as calculated based on information received with the submitted Custom Rebate Application) must be greater than or equal to \$100 to be considered for processing.

Customers are subject to a maximum rebate of \$450,000 from May 1 through April 30 for all SRP programs with separate program area caps of \$300,000 for Energy Efficiency programs, \$300,000 for Business EV programs, and \$100,000 for Beneficial Electrification programs. Program or technology-based limits may also be applicable, based on program terms and conditions. SRP reserves the right to determine at their sole discretion the program year to which a rebate is attributed.

4.2 SERVICE REBATE: PRELIMINARY ASSESSMENTS

SRP offers service rebates for five different Preliminary Assessment categories to help customers evaluate and prioritize various energy efficiency projects. These preliminary evaluations focus on a predefined system or scope of energy efficiency business practices, strategies, and capital improvement opportunities. The assessment offerings and the available rebates are outlined in Table 4.1. To be eligible for these service rebates, the Preliminary Assessment must be pre-authorized by the program and completed by a program-approved QSP.

Table 4.1 Preliminary Assessment Offerings

	Assessment Details	SRP Assessment Rebate
Energy Efficiency Measure (EEM) Assessment	▪ Evaluate and prioritize complex energy efficiency projects within a predefined scope. ▪ A report is provided containing an initial evaluation of energy savings and economic feasibility criteria.	100% of QSP cost up to \$3,000
Compressed Air Assessment	▪ Available for operational and active compressed air system greater than or equal to 100 HP (not including backup units or rental equipment) ▪ Evaluates and identifies potential energy efficiency measures within eligible compressed air systems. ▪ A report is provided containing an initial evaluation of energy savings and economic feasibility criteria.	100% of QSP cost up to \$3,000

Data Center Assessment	▪ Evaluates and identifies potential energy efficiency measures within eligible data centers. ▪ A report is provided containing an initial evaluation of energy efficiency savings and economic feasibility criteria.	100% of QSP cost up to \$3,000
Pump Test Assessment	▪ Evaluates existing pump system efficiency and identifies potential energy efficiency measures for eligible pumps. ▪ Customers with eligible pumping systems can receive multiple assessments on unique systems. ▪ Only one SRP-funded test is allowed per pump system every 23 months.	100% of QSP costs up to \$500 per pump (not to exceed \$3,000)
Compressed Air Leak Assessment	▪ Available for operational and active compressed air system greater than or equal to 25 HP (not including backup units) and less than 100 HP ▪ Identifies compressed air leaks and their economic impacts. ▪ Customers with eligible compressed air systems can receive multiple assessments on unique systems. ▪ One SRP-funded leak assessment is allowed per compressed air system every 23 months.	100% of QSP cost up to \$25/HP (not to exceed \$1,500)
Energy Star Portfolio Manager Benchmarking	▪ Available for sites with a valid Energy Star Portfolio building type. ▪ Must be at least 15,000 sq. ft. or use 300,000 kWh annually to be eligible. ▪ Limited to one building per customer per program year. Additional buildings require SRP approval. ▪ Must provide supporting information to QSP upon request (utility bills, employee count, etc.) ▪ Bonus rebate for first time score of 75 or greater achieved. This can be for an initial score or for customers with demonstrated projects implemented to improve a previous score.	100% of QSP cost up to \$500, Additional \$1,000 QSP bonus for first Energy Star Portfolio Manager Score of 75 or greater

Demand Response Assessment	▪ Available for customer facilities on an E-60 Series SRP Price Plan ▪ Evaluates a customer's ability to participate in SRP's demand response program ▪ Limited to one Demand Response Assessment per customer per year	100% of QSP cost up to \$3,000
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An Energy Efficiency Measure (EEM) Preliminary Assessment may assist eligible SRP customers with identifying retrocommissioning opportunities before proceeding with an RCS project under the Business Solutions Retrocommissioning Program.

4.3 SERVICE REBATE: TECHNICAL ASSESSMENTS

A customer may apply for a more detailed level of technical support known as a Technical Assessment, based upon the findings of the Preliminary Assessment and/or with written approval from SRP. A service rebate is available for 50% of the Technical Assessment costs with maximum funding from SRP of \$15,000 per customer when completed by a program-approved QSP. The QSP will provide the customer with an invoice for the customer's 50% shared cost for the Technical Assessment. The customer is responsible for paying the QSP directly.

A customer may also be eligible for reimbursement of their 50% share of the Technical Assessment cost if they install measure(s) identified in the Technical Assessment that satisfies minimum investment criteria as outlined in their Technical Assessment results. To be considered, eligible customers must complete all the Custom Program Participation Process requirements outlined in section 5 and submit a final Rebate Application for the qualified measures. Upon approval of the customer's final Rebate Application, SRP will reimburse the customer's 50% share, up to \$15,000, and not to exceed a total Technical Assessment service rebate of \$30,000. SRP's total Technical Assessment service rebate payment will not exceed the customer's approved incremental cost to implement the measure(s).

A Technical Assessment is not available for systems that qualify for a Compressed Air Leak Preliminary Assessment.

A Demand Response Preliminary Assessment, while encouraged as a first step, is not required before beginning a Demand Response/ Reduction Technical Assessment.

4.4 MEASURE REBATES

Under the Custom Program, measure rebates are calculated using the energy savings realized as a result of installing a qualified measure. Calculations for energy savings will only consider savings from installed measures that result in a reduction in annual electric use that exceeds the code requirements outlined in ASHRAE 90.1-2016 and/or current industry standard practice for replacement measures.

Qualified measures are eligible for measure rebates paid at \$0.11 per kilowatt-hour for the first year of energy savings once the project is installed and savings verified by SRP, not to exceed 75% of the incremental customer project costs. A customer with compressed air leaks identified as a result of a Compressed Air Technical Assessment must demonstrate that 50% of the compressed air leaks have been repaired to be considered for measure rebates for that compressed air system. The energy savings

realized as a result of repairing the compressed air leaks identified will not be used to calculate the rebate amount.

Many custom projects require that commissioning (measurement and verification related data collection) be performed as outlined in Sections 5 and 6. Commissioning data is used to validate savings and to finalize the rebate amount. The program administrator, after reviewing the preliminary application submission, will issue a preapproval letter that describes the specific commissioning requirements for a project. There are two options for completing commissioning:

- The customer may request assistance from the program administrator to perform all necessary measurement and verification (M&V) related data collection activities. In this case, the program covers the costs for the required data collection. The associated M&V related data collection costs may be considered a rebate to the customer and could contribute toward the customer's annual energy efficiency program rebate cap of \$300,000.
- Alternatively, the customer may choose to use internal resources for data collection, or use their own consultant; however, costs will not be reimbursed by the program.
 - Should the customer choose to maintain ownership of commissioning and then fail to complete the required commissioning:
 - Projects for which commissioning has been deemed mandatory by SRP will become ineligible for rebate.
 - Projects deemed low-risk by SRP may continue to be eligible for rebates, but the rebate shall be reduced by 25%.

If the rebate amount calculated as a result of the installed measures submitted in a final Rebate Application (RA) exceeds the RA reserved rebate amount for the same preapproved measures, SRP, at its discretion, may consider a final rebate payment up to 150% of the RA reserved rebate amount, subject to funding availability. Any measures, except new construction and end-of-useful life replacement measures, that were not preapproved with the RA approval and submitted as part of the final Rebate Application will not be eligible for any custom rebate.

SRP will review all savings estimates for their validity, persistence, and level of commissioning activities as detailed in Sections 5 and 6. SRP retains the right to determine, at its sole discretion, final savings estimates, to specify mandatory commissioning requirements and/or to identify additional commissioning activities, and to reject or request revised applications accordingly.

5.1 OVERVIEW

This section provides information on participating in the Custom Program, including the program process, required submittals, and milestones. SRP will continue to accept Preliminary Assessment Applications, Technical Assessment Applications, and Rebate Applications for the Custom Program until all funds have been committed. Subsequent, submitted applications would be placed on a waitlist in the order received should additional program funding become available. Current information about rebate funding is available by contacting the Program Administrator or online at www.savewithsrpbiz.com.

A summary of the general participation procedure for the Custom Program is shown in Table 5.1. Detailed information about the participation process is provided in the balance of this section.

Table 5.1: SRP Business Solutions Custom Program Customer Participation Overview

Participation Steps	Retrofit and Early-Retirement Replacement Measures	New Construction and End-of-Useful Life Replacement Measures
Step 1	<i>Optional:</i> Submit a Preliminary Assessment Application (if eligible)	
Step 2	<i>Optional:</i> Submit a Technical Assessment Application (if eligible)	
Step 3	Prepare and submit a Rebate Application.	<i>Optional:</i> Submit a Rebate Application to determine measure eligibility
Step 4	Obtain written approval of Rebate Application from SRP before purchasing, installing, and commissioning eligible measure(s)	Purchase and install eligible measure(s)
Step 5	Submit Final Rebate Application and Commissioning Report	Submit Final Rebate Application and Commissioning Report

5.2 PARTICIPATION PROCESS DETAILS

Participation in the Custom Program involves the following basic steps:

- Step 1: Preliminary Assessment Application (if eligible)
- Step 2: Technical Assessment Application (if eligible)
- Step 3: Prepare and submit a Rebate Application. For new construction or end-of-useful life replacement measures, skip to Step 4. (**Note: Customers that purchase, or agree to purchase by signing a purchase order before receiving approval of the Rebate Application from SRP, except for new construction or end-of-useful life replacement measures, or when SRP grants permission to issue purchase orders before preapproval, will not be eligible for participation or rebates. Customers that install equipment before receiving approval of the Rebate Application from SRP will not be eligible for participation or rebates.**)
- Step 4: Purchase, install, and commission the qualifying measures **after** receiving official written approval from SRP for retrofit and early-retirement replacement measures. Written preapproval not required for new construction or end-of-useful life replacement measures.
- Step 5: Submit Final Rebate Application and Commissioning Report

- Customers who have received a Compressed Air Leak Preliminary Assessment are not required to submit a Rebate Application before completing leak repair activities.
- Customer with installed new construction or end-of-useful life replacement measures may discuss the M&V related commissioning requirements for their project with the program administrator (Resource Innovations) prior to submitting the Final Rebate Application and the Commissioning Report.

Figure 5.1 shows a graphical representation of the Custom Program's participation process for customers eligible to receive technical assistance. In contrast, Figure 5.2 shows the participation process for new construction or end-of-useful life measures not requiring preapproval. Figure 5.3 shows a graphical representation of the Emerging Technology Evaluation process for customers who are submitting rebate applications for new or emerging technologies which do not have well established savings based on widespread industry adoption and independent industry-wide evaluation. Additional information about each step (with the exception of the Emerging Technology Evaluation Process) is summarized in the remainder of this section.

The Emerging Technology Evaluation Process (ETEP) is a formal technology assessment process under the Business Solutions Custom Program and participation in this process is at the sole discretion of SRP and the Program Administrator. Contact the Program Administrator if you believe you may have a viable project for consideration under the Emerging Technology Evaluation Process. The purpose of the ETEP is to provide an option for new promising technologies with a way to be thoroughly reviewed and evaluated under the Custom Program. During the evaluation process, the requirement for the cost-effectiveness test (TRC) may be waived (at SRP's discretion) and the Program Administrator may provide technical and other assistance necessary to collect field (M&V related) data.

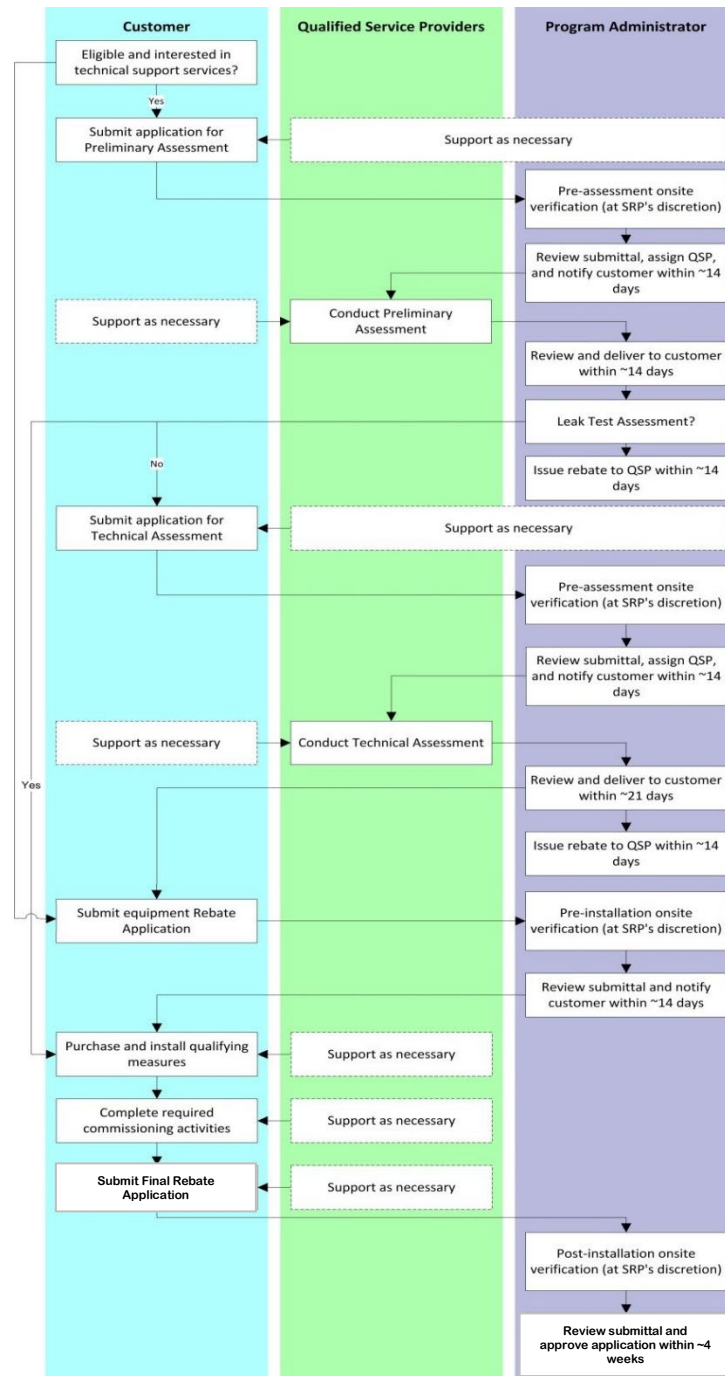


Figure 5.1: Participation Process for SRP Business Solutions Custom Program (Retrofit and Early-Retirement Replacement Measures)

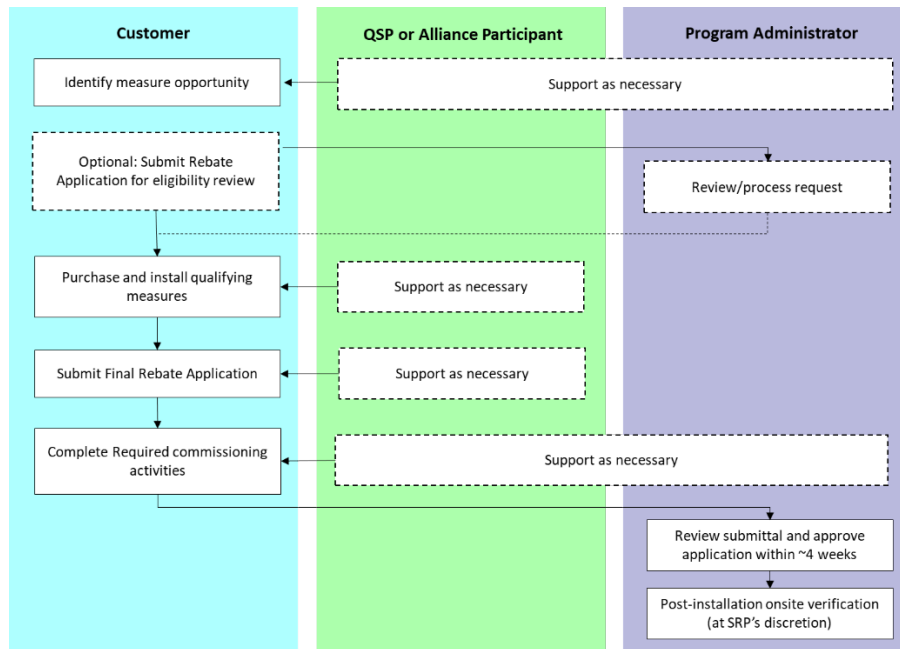


Figure 5.2: Participation Process for SRP Business Solutions Custom Program (New Construction or End-of-Useful Life Measures)

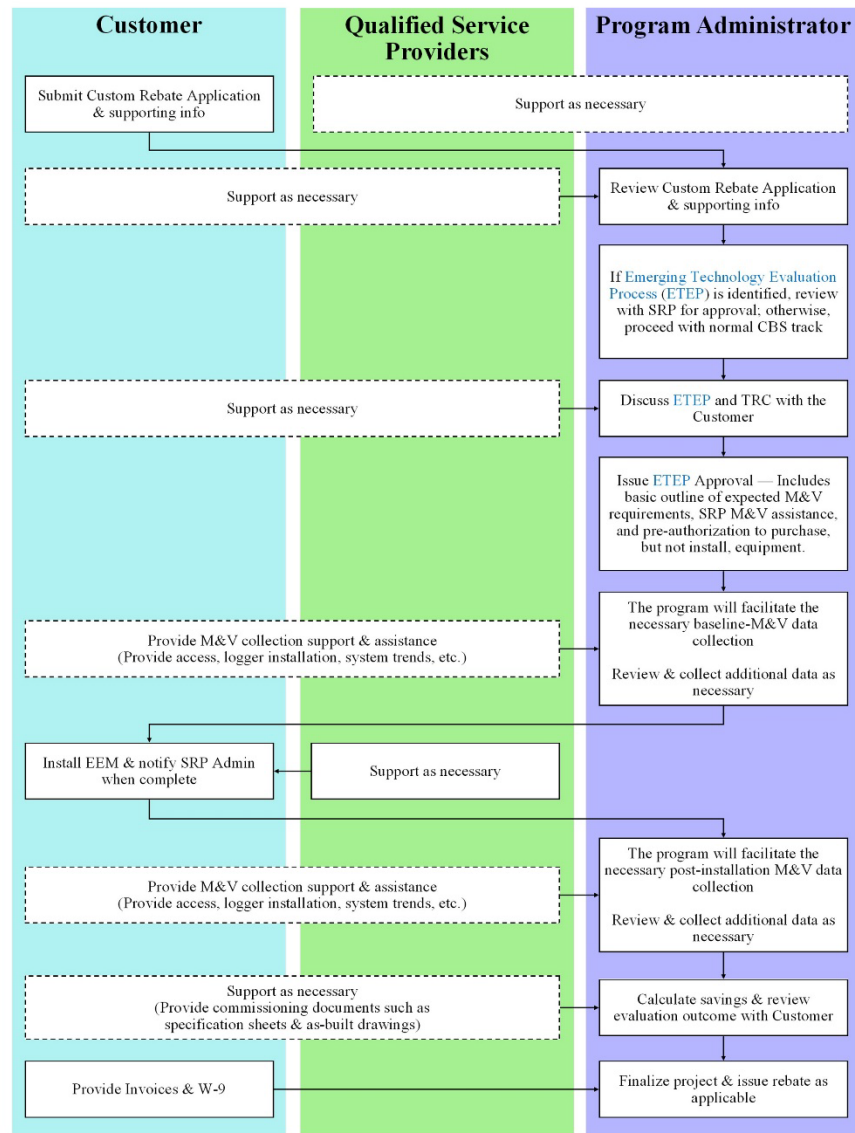


Figure 5.3 Participation Process for SRP Business Solutions Custom Program (Emerging Technology Evaluation Process)

Step 1 – Submit Preliminary Assessment Application (If Eligible)

For eligible customers interested in technical assistance, the first step for participation in the Custom Program is to apply for a Preliminary Assessment of identified measures by completing a Preliminary Assessment Application. This preliminary assessment focuses on a predefined system or scope of energy efficiency business practices, strategies, and capital improvement opportunities. The Preliminary Assessment is not a comprehensive assessment and will not address measures where a rebate is available under the SRP Business Solutions Standard Program without SRP's prior written approval.

For the EEM, Compressed Air, and Data Center Preliminary Assessments, participants will receive a written report recommending general energy efficiency measures and initial estimates of costs and savings (electric and gas) based on industry averages. The report will include recommendations on specific systems or opportunities that require more detailed assessments. SRP funds these three (3) Preliminary Assessment offerings up to \$3,000.

Participants for the Pump Test Preliminary Assessment will receive a summary of the pump test results documenting the existing pump system efficiency and recommendations for potential energy efficiency measures. SRP funds Pump Test Preliminary Assessments up to \$500 per eligible pump tested, not to exceed \$3,000 for all pumps.

Participants for the Compressed Air Leak Test Preliminary Assessment will receive a summary of the identified compressed air leaks and their economic impacts within their facility. Compressed Air Leak Test Preliminary Assessments are funded by SRP up to \$25/HP of active air compressors tested not to exceed \$1,500.

All Preliminary Assessments must be conducted by an SRP-approved QSP as assigned by the Program Administrator to be eligible for the Preliminary Assessment service rebate. A list of SRP-approved QSPs can be requested by contacting the Program Administrator.

Step 2 – Request a Technical Assessment (If Eligible)

After receiving the Preliminary Assessment findings, a customer may apply for a more detailed Technical Assessment by submitting a Technical Assessment Application. The Technical Assessment includes comprehensive detail into each recommended measure and/or efficiency practice identified in the Preliminary Assessment. The report will include estimations of implementation costs, energy, and demand savings (electric and gas), program rebates, and payback periods. A service rebate is available for 50% of the Technical Assessment costs with maximum funding from SRP of \$15,000. A customer may also be eligible for reimbursement of their 50% share of the Technical Assessment cost if they install measure(s) identified in the Technical Assessment that satisfy minimum investment criteria as outlined in their Technical Assessment results.

All Technical Assessments must be conducted by an SRP-approved QSP as assigned by the Program Administrator to be eligible for the Technical Assessment service rebate. A list of QSPs with experience in providing Technical Assessments is available by contacting the Program Administrator. SRP reserves the right to determine if a project can proceed directly to the Technical Assessment without completing a Preliminary Assessment.

Step 3 – Submit a Rebate Application

Customers must submit a completed Rebate Application to the Program Administrator and receive written preapproval of that Rebate Application **before** purchasing or installing any energy efficiency equipment. Preapproval is not required for the following measures:

- New construction or end-of-useful life replacement measures
- Repairs for compressed air leaks being conducted after a Compressed Air Leak Preliminary Assessment

Upon submittal, SRP will review the eligibility of the proposed measures. **Customers that purchase, or agree to purchase by signing a purchase order before receiving approval of the Rebate Application from SRP, except when SRP grants approval to issue purchase orders, will not be eligible for participation or rebates. Customers who install equipment before receiving the Rebate Application approval from SRP will not be eligible for participation or rebates.**

For custom measures under new construction or end-of-useful life replacement-type scenarios, the customer can apply for a rebate post-purchase. These measures do not require preapproval prior to purchasing, ordering, or installing the equipment. The customer may submit a pre-application (Rebate Application) prior to completing the measure installation. By submitting a Rebate Application, SRP will review the measure(s) for eligibility and provide guidance on post-installation commissioning activities to submit with the Final Rebate Application. Please note that these measures must still meet the Custom program's cost-effectiveness requirements (see Section 3.2 for Total Resource Cost test). If the customer is uncertain whether the measure meets the cost-effectiveness requirements of the Custom Program or needs an estimate of the potential rebate amount from SRP, it is recommended to submit a pre-application (Rebate Application) and wait for the preapproval.

Customers may submit a single Custom Rebate Application for projects involving a major system (such as refrigeration, compressed air, or an HVAC central plant) that includes both Standard eligible and Custom components. The Rebate Application is available for download online at www.savewithsrpbiz.com, by contacting the Program Administrator, or participating QSPs. The application requests the following information:

- Identification of the customer site(s) and the SRP account number(s)
- Customer acceptance of terms and conditions
- Information about the installation site, such as primary use and size
- Engineering calculations estimating energy and demand savings based on the efficiency of the proposed equipment compared to appropriate baseline conditions.
- A proposed commissioning plan describing how the customer will ensure proper measure installation and operation and demonstrate the level of achieved energy and demand savings. Also, the commissioning plan will include:
 - A description of the proposed methods for calculating energy and demand savings
 - A schedule for conducting and reporting on commissioning activities, as in some cases, pre-installation commissioning activities, may be required to estimate savings accurately.
- A work plan for measure design, implementation, operation, and management, including the anticipated project timeline

SRP may request clarification or additional information about any item in the application. Customers will have 14 days to respond to such requests. If the clarification or additional information is not forthcoming, SRP may choose to discontinue its evaluation and reject the customer's application or a proposed measure.

SRP may also conduct an inspection of the existing equipment, at their sole discretion, to verify the information submitted in the Rebate Application. The pre-installation inspection requires at least one representative of the customer who is familiar with the proposed measures and the facility so that all

parties can identify any discrepancies. If the inspection cannot be completed in a timely manner because the representative(s) is unfamiliar with the facility or measures, the project site will fail the inspection, and SRP may reject the customer's application.

SRP will review all proposed measures' eligibility, the accuracy of the savings estimates, and the comprehensiveness of the commissioning plan. In general, it is recommended that the customer use the commissioning guidelines included in Section 6. However, the customer may choose to develop an alternative approach. In either case, the commissioning plan must be approved by SRP as part of the Rebate Application approval process. For new construction and end-of-useful life replacement that do not require preapproval, a M&V related commissioning plan will be determined once the Final Rebate Application is received.

Commissioning requirements will vary in detail and rigor depending on the measures proposed to be installed. For each measure, the commissioning plan will be reviewed considering the predictability of equipment operation, the availability of data from similar measures, and the chosen approach's benefits relative to its cost. Customers are responsible for conducting all commissioning activities for the project; however, SRP will work with the customers to facilitate commissioning planning requirements as necessary. Please refer to Section 6 for more information about the commissioning requirements. Customers can also contact the Program Administrator to inquire whether standardized commissioning plans are available for measures they are planning to install.

Upon completion of any pre-inspections or requests for additional information, SRP will review the application and eligibility of the proposed measures. SRP will target completing review activities within 14 days of receiving a fully completed Rebate Application and any subsequently requested supporting information. Customers will be notified in writing regarding their preapproval status. The preapproval notification will state the estimated rebate amount and the deadline for submitting the final Rebate Application. The estimated rebate amount is the maximum rebate amount available to the customer for the preapproved measures. The estimated rebate amount will be reserved for the customer project until the final Rebate Application deadline. Any rebate requests for installed equipment submitted after the final Rebate Application deadline will be subject to funding availability and program rules at the time of submittal.

Step 4 – Purchase and Install Qualifying Measures

Customers may purchase and install qualifying retrofit and early-retirement replacement measures only after receiving the written rebate application preapproval from SRP. For new construction or end-of-useful life measures, customers may purchase and install qualifying measures without any pre-approval from SRP. Please note rebates will not be paid for any variation in preapproved measures when preapproval is required, including increases in quantity without prior written approval from the Program Administrator. Only the estimated rebate amounts stated in the customer preapproval notification will be reserved until the rebate application deadline unless otherwise approved in writing by the Program Administrator.

Step 5 – Submit Final Rebate Application and Commissioning Report

After installation, customers must notify the Program Administrator by submitting a final Rebate Application reflecting actual installed measures and a copy of the dated paid invoice(s) for equipment and installation. For measures that received pre-approval, a completed commissioning report as outlined in the pre-approval letter should be included with the final Rebate Application. Any changes in project scope or equipment specifications shall be noted on the final Rebate Application. Any newly listed energy savings measure(s) not part of the original preapproval may not be considered to receive any rebates under the program. If a final Rebate Application is submitted after the rebate application deadline, the estimated rebate amount will be subject to rebate funding availability and program rules at the time of submittal.

Upon submittal, SRP will review the final installed measures. SRP may request clarification or additional information (including but not limited to manufacturer's specification sheets demonstrating installed equipment complies with the program requirements and commissioning data for post-purchase measures) necessary to complete the review process. Customers will have 14 days to respond to such requests. If the clarification or additional information is not forthcoming, SRP may choose to discontinue its evaluation and reject the measure(s).

SRP may also conduct an inspection of the installed measures, at their sole discretion, to verify the information submitted in the Final Rebate Application. The post-installation inspection requires at least one representative of the customer who is familiar with the installed measures and the facility so that all parties can identify any discrepancies. If the inspection cannot be completed promptly because the representative(s) is unfamiliar with the facility or measures, the project site will fail the inspection. SRP will also retain the right to inspect the installed measure(s) up to two years following installation.

SRP will target completing review activities and issuing rebate payments for any approved measure(s) within four (4) weeks of receiving the Final Rebate Application or subsequently received clarification and supporting information from the customer.

For this program's purposes, commissioning includes verification of the project's energy savings and confirmation that the measures are operating as intended. This requirement ensures that the predicted energy savings are being achieved and that the system's operation and performance have been optimized. Commissioning requirements are the customer's responsibility and can be completed by internal staff or by contracting with outside parties. The commissioning plan will be required to be submitted for each project with the Rebate Application. An approved commissioning plan is required to receive the full rebate amount.

During SRP's review of a customer's Rebate Application, SRP will classify a measure based on the likelihood that the estimated energy savings will be realized and assign commissioning requirements according to the level of risk:

- **Low Risk:** For measures with a low risk of not realizing savings estimates, savings values are stipulated based on engineering calculations using typical equipment characteristics and operating schedules developed for particular applications, without on-site testing or metering.
- **Medium Risk:** For measures with a moderate risk of not realizing savings estimates, savings values are based on engineering calculations using typical equipment characteristics and operating schedules developed for particular applications, with some spot or short-term metering.
- **High Risk:** For measures with a high risk of not realizing savings estimates or a large degree of complexity, savings are estimated through the application of metering, billing analysis, or computer simulation. Any project engaging in the Emerging Technology Evaluation Process will be classified as high risk by the Program Administrator.

Commissioning requirements will vary in detail and rigor depending on the measures installed. The level of detail and rigor of the commissioning plan is subject to the measure size, the risk to rebates, and estimated savings risk levels. Commissioning must be completed when the measure's operation cannot be verified or specified in the commissioning plan.

Commissioning activities for low and moderate risk measures will rely heavily on the manufacturer's specifications for determining equipment performance. Manufacturers' data in conjunction with simple calculations can be used to determine the electrical energy and demand savings. Spot measurements for these approaches may include measuring chilled water and/or condenser water temperatures and flows, demand measurements on motors, air-side temperature and flow measurements.

Commissioning activities for high-risk measures may involve preparing an energy model to determine electric energy and demand savings due to interactive effects on several building systems. Another approach may involve installing an electric meter(s) on specific equipment to measure energy consumption. The consumption of the new equipment would be compared to one or several of the following sources of data to determine the savings:

- The predicted electric energy use/savings from the energy model
- Output energy to determine equipment efficiency.
- Baseline equipment energy use that was previously installed
- An energy code baseline for new construction or major renovation projects
- If the output energy can be measured, trend data can be collected either through an existing or new Building Automation System (BAS) or with portable data-logging equipment

SRP offers a range of energy efficiency opportunities to help commercial and industrial customers save energy and money. Reduced energy costs, technical assistance, and/or incentives are available for qualifying customers. Below is a summary of other available commercial and industrial energy efficiency and electrification programs. Additional information regarding eligibility requirements, rebates, and participation processes is available at www.savewithsrpbiz.com or by contacting the Program Administrator.

SRP Business Solutions Standard Program

The SRP Business Solutions Standard Program promotes the purchase of industry-proven, high-efficiency equipment. Rebates serve to buy down the difference between the cost of high-efficiency and standard equipment, thereby making the high-efficiency equipment a more attractive option for customers. Rebates are available for qualifying lighting, HVAC, data center, building envelope, kitchen equipment, compressed air, and refrigeration measures.

SRP Business Solutions Custom Program

The SRP Business Solutions Custom Program provides a comprehensive platform for cost-effective non-residential energy efficiency projects not addressed by the SRP Business Solutions Standard Program. One of the primary goals of the program is to obtain verifiable, cost-effective, and persistent electrical energy savings that result from the installation of energy efficiency measures.

In addition to equipment rebates, SRP offers eligible customers the opportunity to receive service rebates through energy efficiency assessments performed by SRP approved Qualified Service Provider (QSP). These assessments focus on a predefined system or scope of energy efficiency business practices, strategies, and capital improvement opportunities. They can provide both initial and investment-grade reports to assist customers in screening, evaluating, and prioritizing complex energy efficiency projects.

SRP Business Solutions Retrocommissioning Program

The SRP Business Solutions Retrocommissioning Program helps customers achieve demand and energy savings in commercial and industrial facilities. Savings are realized through the systematic evaluation of facility systems and customer's implementation of cost-effective, energy efficiency measures targeted to improve facility operation that, in many cases, also improve occupant comfort and production efficiency.

Program participants are customers with 50,000+ sq. ft. of conditioned space or 1,000,000 kWh in usage, which have demonstrated a commitment to spend \$3,000 or more to implement identified retrocommissioning measures with an estimated total project simple payback of 2.0 years or less calculated before rebates and based upon electric and associated gas savings. Additionally, a Monitoring-Based Commissioning (MBCx) option is available for customers with 150,000+ sq. ft. or 3,000,000 kWh to utilize data analytics to find additional potential savings.

SRP Business Solutions New Construction Program

The SRP Business Solutions New Construction Program provides technical assistance and financial rebates to help architects, engineering professionals, and building owners optimize energy and demand savings, and reduce operating costs in commercial new construction projects. Projects must be new construction or major renovation and must be 20,000 square feet or greater for commercial, industrial, retail, multifamily, or core and shell use. Projects that are most likely to succeed in meeting the program's goals will be accepted. The program offerings are scalable for projects of varying sizes under two different tracks, and flexible to grow with customer demand.

The Expedited Track is suitable for projects with accelerated design schedules that are unable to invest the time necessary for participating under the enhanced performance track. The buildings under this track

will have less aggressive savings targets; typically, these buildings will have less than 75,000 square feet of conditioned floor space but must be $\geq 20,000$ square feet (new construction/renovation/additions).

The Enhanced Performance Track offers Energy Design Assistance (EDA) service incentives. This track employs a whole building performance-based strategy that fosters an integrated design approach with the project's design team starting during the project's schematic design phase. Early involvement, combined with the comprehensive interaction of key project stakeholders, affords the opportunity to cost-effectively evaluate and incorporate efficiency strategies while design components are still fluid. Under the Enhanced Performance Track, the buildings will have $\geq 50,000$ square feet of conditioned floor space (new construction/renovation/additions).

SRP Business Solutions Small Business Program

The SRP Business Solutions Small Business Program promotes the purchase of high-efficiency lighting and HVAC upgrades in small commercial and industrial facilities. No-cost assessments are available to qualifying customers to help identify lighting efficiency and HVAC upgrade opportunities. Rebates are also available to preapproved installation contractors to buy down the difference between the cost of energy-efficient systems and standard lighting and HVAC equipment, thereby making the high-efficiency equipment a more attractive option for customers. Rebates are available for qualifying lighting and HVAC measures.

SRP Business Solutions Electrification Program

Thinking of switching to electrically fueled equipment at work? The SRP Business Solutions Electrification Program promotes the purchase of qualifying equipment to convert fossil fuel powered equipment to electric to reduce carbon emissions and make for healthier and safer work environments. Rebates for electric forklifts, electric truck refrigeration, and electrified truck parking spots are available, with additional custom rebates available for site specific equipment like industrial process heating or mid or large heavy-duty fleet conversions. More information can be found at <https://savewithsrpbiz.com/etech>, by calling 602-236-9650, or by emailing etechrebates@srpnet.com

SRP Business Solutions Workplace EV Program

The SRP Business Solutions Workplace EV Program promotes the purchase of qualifying charging equipment to power electric vehicles. Your customers and employees will welcome the convenience to charge at work, to encourage customers to stay longer, and to count this initiative towards your sustainability goals. The program provides a per port rebates for level 2 chargers. For technical assessments or program support visit <https://savewithsrpbiz.com/rebates/evcharger.aspx>

SRP Business Solutions Multifamily Program

The SRP Business Solutions Multifamily Program promotes the purchase of high-efficiency lighting, HVAC, building envelope, and tenant upgrades in apartments and other multifamily properties. Contractors promote rebates for both tenant spaces and common areas, with a variety of rebate opportunities available. Be on the lookout for more information at <https://savewithsrpbiz.com>

SRP Business Demand Response Program

SRP is collaborating with a company called Enel X to offer commercial, institutional, and industrial organizations incentive payments for participating in a new program to maintain a reliable and cost-effective electric grid. Between May and October each year, large energy consumers can earn payments for making targeted energy reductions during times of peak demand. Interested customers can contact their Strategic Energy Manager (SEM) for more details and to determine if they would be a good fit for the program.

A brief listing of energy efficiency resources available on the Web is provided below.

- AHRI Online Directory of Certified Equipment. The Air Conditioning, Heating and Refrigeration Institute (AHRI) is a national trade association of HVAC equipment manufacturers. A publicly available online directory lists detailed equipment information for all certified equipment. (www.ahridirectory.org)
- Air Conditioning Contractors of America (ACCA). The ACCA is a non-profit organization representing HVAC contractors in the U.S. Current industry information and resources are available from their web site. (www.acca.org)
- Consortium for Energy Efficiency (CEE). CEE is a non-profit organization that develops national initiatives to promote the manufacture and purchase of energy-efficient products and services. (www.cee1.org)
- Department of Energy – Energy Efficiency and Renewable Energy (EERE). EERE provides information for consumers on a wide range of energy efficiency topics. (www.eere.energy.gov)
- ENERGY STAR. ENERGY STAR is a government-backed program designed to help consumers increase their energy efficiency. (www.energystar.gov)
- Electrical Apparatus Service Association, Inc. (EASA). EASA provides its members with current information on materials, equipment, and technological advances in the electromechanical industry. (www.easa.com)
- Motor Decisions Matter. Motor Decisions Matter is a nation program encouraging proper motor selection and management. The program is supported by a number of industry trade groups and orchestrated by the Department of Energy's Office of Industrial Technologies. (www.motorsmatter.org)
- National Electrical Manufacturers Association (NEMA). The Motor and Generator section of NEMA has developed an industry standard for premium efficiency motors. (www.nema.org)
- US Green Building Council (USGBC). USGBC is composed of more than 13,500 organizations from across the building industry that are working to advance structures that are environmentally responsible, profitable, and healthy places to live and work. (www.usgbc.org)

What is the measure rebate amount?

Rebates will be paid at \$0.11 per kilowatt-hour for the first year of energy savings once the project is installed and savings verified by SRP, but will not exceed 75% of the incremental customer cost, as determined by SRP. To receive the full rebate amount, Customers must complete the required commissioning activities; and when deemed applicable, rebates may be reduced by 25% for not completing the commissioning activities. Rebate amounts are also subject to an additional cap, as described in a subsequent question.

What service rebates exist?

SRP can provide eligible customers with a Preliminary Assessment to help evaluate and prioritize complex energy efficiency measures. The Preliminary Assessment reports on an initial evaluation of energy savings and economic feasibility criteria of pre-identified systems or energy efficiency measures. Customer eligibility and assessment funding will vary based on the type of assessment selected. Sections 2 and 3 of the manual provide further detail.

A customer may also apply for a more detailed level of technical support, termed the Technical Assessment, after the findings of the Preliminary Assessment and/or with written approval from SRP. Customer eligibility and assessment funding are detailed in Section 2 and 3 of this manual.

Are there any rebate caps?

- Rebates cannot exceed 75% of the incremental customer cost for each project.
- Customers are subject to a maximum rebate of \$450,000 from May 1 through April 30 for all SRP programs, with separate program area caps of \$300,000 for Energy Efficiency programs, \$300,000 for Business EV programs, and \$100,000 for Beneficial Electrification programs. Program or technology-based limits may also be applicable, based on program terms and conditions. SRP reserves the right to determine at their sole discretion the program year to which a rebate is attributed.

Is preapproval required?

All custom retrofit measures, except for new construction or end-of-useful life replacement measures, require written approval from SRP **prior** to the order, purchase, or installation of equipment. New construction or end-of-useful life replacement measures must still meet cost-effectiveness eligibility requirement under the program.

What is the difference between a preliminary assessment and a technical assessment?

The preliminary assessment is a simple energy assessment, funded 100% by SRP up to \$3,000. The technical assessment is an investment-grade assessment, whose costs will be shared between SRP and the customer, up to \$15,000. The remaining eligible 50% cost of the technical assessment, up to \$15,000, will be paid by SRP for customers who submit an eligible final Rebate Application for a measure(s) that meets the customer's minimum economic investment criteria, as stated in the Technical Assessment Application. SRP's total rebate payment associated with the Technical Assessment will not exceed the customer's approved incremental cost to implement the measure(s).

After the technical assessment, is the customer required to implement the measures?

Customers are not required to implement any or all of the measures as per the technical assessment report. Customers must submit and obtain SRP's approval of the Rebate Application before purchasing, agreeing to purchase, or installing measures to receive rebates for measure

implementation, except for compressed air leak repair activities conducted after a Compressed Air Leak Preliminary Assessment.

Can customers choose a Qualified Service Provider (QSP) to conduct the preliminary and technical assessments?

Customers can request a specific QSP to conduct the Preliminary and Technical Assessments. Requested QSPs must be preapproved through the program before participating in or conducting assessments. In all other cases, Customers will be required to approve the QSP assigned by SRP.

How is eligibility determined for customers with multiple meters on different price plans at a single facility address?

For customers with multiple meters on different price plans, eligibility must be determined on a measure-specific basis. Measures are eligible only if directly supplied with electricity from a meter on an eligible price plan. Please contact the Program Administrator or your SRP Strategic Energy Manager to confirm whether measures will qualify for the program.

Are customers eligible to participate in SRP's other energy efficiency programs and SRP Business Solutions Custom Program at the same time?

Yes, but individual measures may only receive rebates under one program. Also, any measure eligible for rebates under the SRP Business Solutions Standard Program must be submitted through that program.

What if the equipment specifications or scope of my completed measure(s) differs from the Rebate Application description?

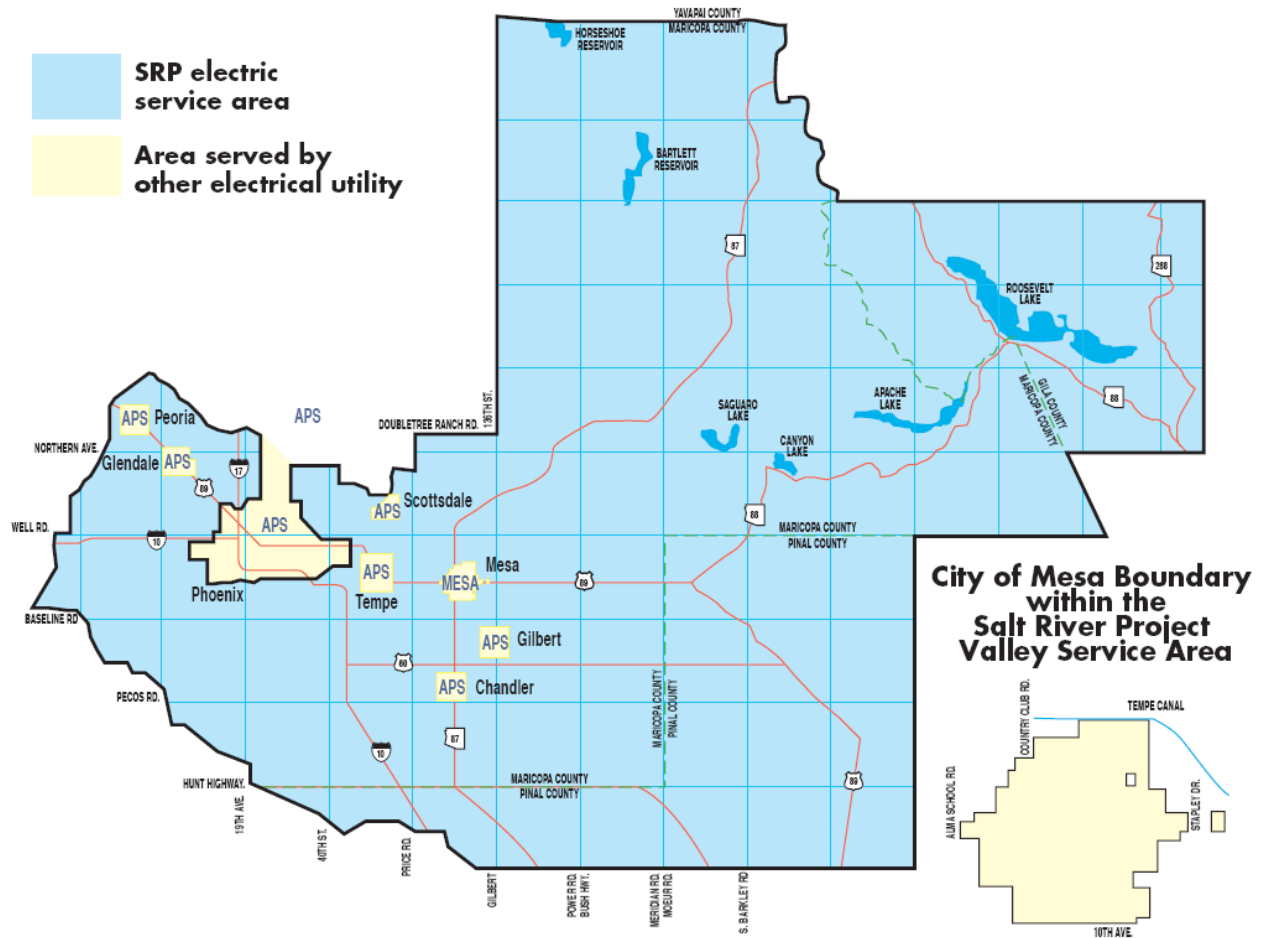
SRP recognizes that project plans and specifications may change as installations are made. Complete equipment descriptions are to be included in the final documentation sent to SRP. Rebates may exceed the amount reserved by the Rebate Application preapproval only when funds remain in the program budget, and no projects have been placed on a waitlist for program participation.

Where can I find out more about this program?

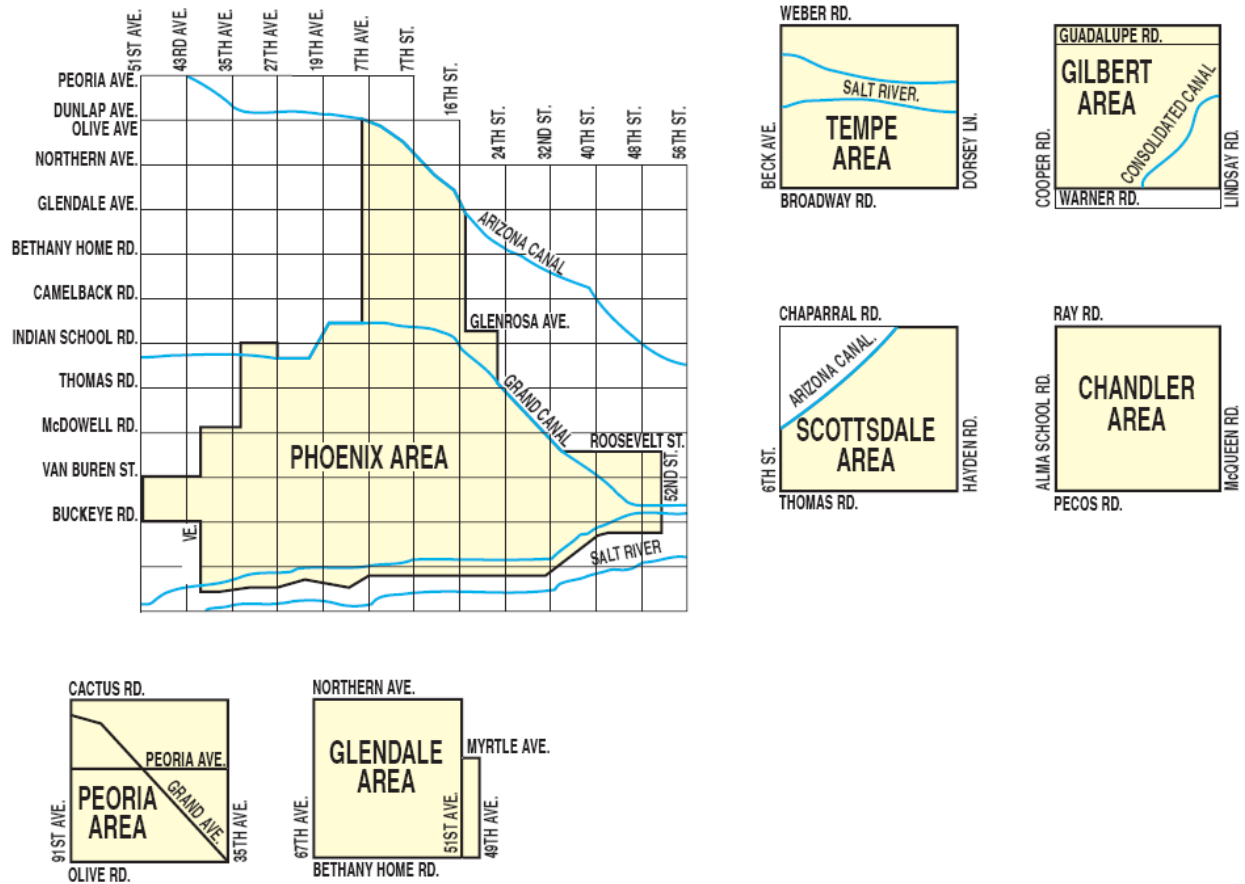
Customers can learn more about the SRP Business Solutions Custom Program and other SRP programs in the following ways:

- Web
 - savewithsrpbiz.com
- Telephone
 - (602) 236-3054
- Fax
 - (480) 345-7601
- Email
 - savewithsrpbiz@srpnet.com

An illustration of SRP's service area is provided below. A more detailed map of the SRP service area is available by contacting the Program Administrator.



APS Boundaries within the Salt River Project Valley Service Area





Customer hotline: (602) 236-3054

Qualified Service Provider hotline: (602) 236-1611

savewithsrpbiz@srpnet.com
