



Implementation Steps and Processes

City and School Matching Grant Programs

Phase	Awardee's Responsibility	Available Assistance from Program Implementer
Phase 1: Project Identification and Grant Application Timeframe 1-2 months	<ul style="list-style-type: none"> • Staff identifies project • Determine appropriate steps to follow to apply for grant 	<ul style="list-style-type: none"> • Assist applicant in identifying projects that may be eligible for Program, if applicant is aware of Program at this stage
	<ul style="list-style-type: none"> • Find contractor • Identify budget and projected energy savings for projects • Work with contractor to develop kW savings estimate and identify M&V approach 	<ul style="list-style-type: none"> • Provide assistance in evaluating energy-efficiency opportunities • Support applicant and applicant's contractor upon request via conference calls
	<ul style="list-style-type: none"> • Determine sources of funds for projects 	<ul style="list-style-type: none"> • Help identify and evaluate project funding options
	<ul style="list-style-type: none"> • Submit complete application with supporting documentation 	<ul style="list-style-type: none"> • Receive application • Send automated response via email to applicant
Phase 2: Application Review Timeframe 2-3 months		<ul style="list-style-type: none"> • Review application to determine if complete
	<ul style="list-style-type: none"> • Applicant fills gaps in application • Resubmits application 	<ul style="list-style-type: none"> • Call applicant to fill gaps, if needed • Receive resubmitted application
		<ul style="list-style-type: none"> • Grant review committee approves/denies application
		<ul style="list-style-type: none"> • Notify grant applicants of results by letter within 60 days of application submission
Phase 3: Pre-Project M&V Timeframe 1 month	<ul style="list-style-type: none"> • Awardees will work with Program Implementer to establish inspection timeline for deemed savings or M&V plan 	<ul style="list-style-type: none"> • Contact awardees within 1 week to establish inspection timeline for deemed savings or M&V plan
	<ul style="list-style-type: none"> • Work with contractor to follow documentation requirements 	<ul style="list-style-type: none"> • Support applicant and applicant's contractor upon request via conference calls
	<ul style="list-style-type: none"> • Applicant completes pre-project documentation for M&V steps • Submit to Program Implementer for review 	<ul style="list-style-type: none"> • Review documentation for accuracy

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