

# Service Provider Manual

## ComEd® Energy Efficiency Program Retro-Commissioning (RCx) Flex Offering

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# 1. Definitions

- **Application** provides a description of the RCx Flex offering and requests customer and building information for review prior to project acceptance.
- **Building Operator Certification (BOC)** elevates the profession of the building operator through training in energy efficiency and smart building technologies, continued education, and certification.
- **ECM Form** states ECMs and associated costs, energy savings and economic impacts. This document will be utilized throughout the entire study to communicate ECMs and seek customer approval to proceed with the implementation of ECMs.
- **Energy Conservation Measures (ECMs)** are used to describe low-cost opportunities that reduce the consumption of energy in a building.
- **Energy Efficiency Service Providers (Service Provider)** are a closed network of engineering consulting firms authorized by Resource Innovations, Inc. (“Resource Innovations”) and ComEd to conduct RCx Flex projects.
- **ENERGY STAR Portfolio Manager** is an online tool that is used to measure and track energy and water consumption, as well as greenhouse gas emissions.
- **Europa** is a project management tool used for uploading applications, submitting report deliverables for review, and tracking projects throughout their duration.
- **Implementation (IMP) Phase** occurs when the facility staff or a contractor implements the selected ECMs. Technical support from the Service Provider ensures ECMs are installed correctly and any needed adjustments are made during installation.
- **Implementing Subcontractor** refers to a third party subcontractor to Resource Innovations who will provide Service Provider management support.
- **Investigation (INV) Phase** occurs when the Service Provider visits the facility to analyze energy-using systems and develop a list of recommended ECMs. The Service Provider then submits an Investigation Report and calculations to Resource Innovations for review detailing initial findings.
- **INV Report** details initial estimates of ECMs identified during the INV phase.
- **Measurement and Verification (M&V) Guidelines** are a set of general engineering guidelines that are encouraged to be followed in preparing required RCx Flex deliverables and supporting calculation files to ensure that calculation methods provide accurate energy and cost savings to both the RCx Flex offering and participants.
- **Resource Innovations** is the Program Administrator, contracted by ComEd to provide administrative and engineering review services for the RCx Flex offering.
- **Participant** is a ComEd customer that demonstrates a commitment to supporting the Retro-Commissioning study and an interest in implementing low-cost energy conservation measures.
- **Retro-Commissioning (RCx) Flex** is an expert analysis of a building’s existing energy-using systems that identifies ECMs through four (4) phases.
- **Verification (VER) Phase** occurs when the Service Provider returns to the facility to verify the proper installation of ECMs and then submits a VER Report and calculations to Resource Innovations for review.
- **VER Report** details final results of ECMs verified during the VER phase.

## 2. Introduction

### 2.1. Overview

One of the primary objectives of the ComEd energy efficiency portfolio is to offer customers every opportunity to help manage their energy expenses. The suite of available program initiatives provides incentives for nearly every energy-efficient technology and product available in today's market. The Retro-Commissioning (RCx) Flex offering is uniquely suited to work alongside or directly after existing capital improvement incentives by offering energy analysis services to identify low-cost energy conservation measures (ECMs).

The RCx Flex offering is a fully funded study designed to help customers achieve electric energy, peak electric demand, and natural gas savings for facilities in the ComEd service territory. Savings are realized through the systematic evaluation of facility systems and implementation of cost-effective ECMs targeted to improve facility operation that, in many cases, also improve occupant comfort and production efficiency.

This document provides information and describes the Service Provider's roles and responsibilities as an approved Energy Efficiency Service Provider (Service Provider) for the ComEd RCx Flex offering. It is the Service Provider's responsibility to review, understand and follow the requirements outlined in this manual.

## 3. RCx Flex Information

### 3.1. Description

The RCx Flex offering is designed to identify, implement, and verify ECMs that have a simple payback of 18 months or less to improve the efficiency of major energy-using systems and reduce energy costs without adversely affecting the facility or system operations. The Service Provider will investigate ECMs and present them to the customer, provide technical support to the implementation team for the installation of selected ECMs, and verify implemented ECMs.

Participating customers will receive assistance in identifying other ComEd Energy Efficiency Program incentives, including incentives for energy-efficient equipment upgrades, however, the scope of the RCx Flex project is focused on operational efficiency opportunities. Major capital improvements identified such as lighting and chiller replacements will be directed to the appropriate energy efficiency program elements and are not to be calculated in detail within the RCx Flex offering.

The primary objective of the RCx Flex offering is to identify and verify the customer implementation of ECMs targeting electric and natural gas savings. However, it is recognized that additional economies of scale can be realized during the RCx Flex study to identify other savings opportunities within a facility. As such, customers are free to pursue additional contracting with the Service Provider to expand the scope of work (e.g., identify water or other fuel type savings opportunities) and cover all Service Provider time and costs associated with these additional services. Addition of these services must not create an unnecessary delay in the utility-sponsored RCx Flex services.

### 3.2. Energy Conservation Measures

The following table lists common eligible and ineligible ECMs. These eligible ECMs should be investigated for all projects, as applicable.

**Table 3-1. Energy Conservation Measures**

Eligible ECMs	Ineligible ECMs
Reduce minimum outside air flow	Fuel switching from electric to gas
Correct economizer operation	Measures negatively affecting occupant comfort
Eliminate simultaneous heating and cooling	Major equipment replacement
Improve process controls	Measures necessary for basic facility operation
Reduce supply air static pressure set points	Measures eligible for standard incentives
Eliminate chilled water short-circuiting	Measures that rely solely on behavioral changes
Improve chiller or other equipment sequencing	Maintenance of existing equipment
Correct refrigerant charge	Low drop pressure filter replacement
Improve equipment scheduling	Generate electricity, including cogeneration or renewable energy generation
Reduce air flow in CV air handling systems	Required by local, state, or federal law; building or other codes; or are standard industry practice
Improve refrigeration system controls	

### 3.3. Find and Fix

If ECMs are identified while the Service Provider is performing their on-site work during the Investigation Phase, facility staff or a third party contractor is not permitted to implement ECMs until baseline data has been collected using the M&V Guidelines. Customer permission must be received before any ECMs are implemented. Project progression under this approach is as follows:

- If all ECMs are “find and fix” then the Investigation Report will be waived and the Verification Report should be completed and submitted to Resource Innovations for review via Europa.
- If some of the ECMs are “find and fix” then the Investigation Report will be required and the normal project progression will be followed with the payment of verified savings occurring after all ECMs have been verified.

### 3.4. Customers with Multiple Projects

Service Providers who submit three (3) or more applications at a time for the same customer will have their applications reviewed and screened more thoroughly. A technical screening call between the customer, Service Provider and Resource Innovations will be required. For customers who have not previously participated in the RCx Flex offering, a maximum of three (3) applications will be accepted. Once accepted these projects must establish cost effectiveness prior to acceptance of additional applications.

Before additional applications can be accepted for the same customer the following criteria must be met:

- The initial three (3) projects must have approved Investigation Reports with an average forecasted energy savings of at least 50,000 kWh.
- A signed Investigation ECM Form or an email from the customer with the selected measures for implementation along with a defined date of completion.
- A maximum of three projects may reside in the Investigation phase.
  - If one project moves into the Implementation Phase, then the RCx Flex offering may consider accepting one new application.
- For Cancelled projects:
  - If one project is cancelled then the RCx Flex offering may consider accepting one new application.
  - If two or more projects cancel then the RCx Flex offering will not consider accepting new applications with the original Service Provider.
- Any additional customer acceptances will be at the sole discretion of ComEd.

### 3.5. Inspections

Resource Innovations will perform inspections during Investigation and Verification phases as needed to ensure optimal performance of the RCx Flex offering. Inspections provide support to new Service Providers in conducting site visits and understanding M&V Guidelines, reducing calculation discrepancies and addressing technical review comments, and supporting the evaluation process. Service Providers will be notified prior to the inspection taking place and will be afforded the opportunity to attend with Resource Innovations. Projects that meet any of the following criteria will be flagged for an inspection.

- A Service Provider’s first project for either the RCx Flex or MBCx offering.
  - Please coordinate with Resource Innovations prior to scheduling the first site visit.
- Projects with Investigation or Verification Report energy savings exceeding 750,000 kWh and/or 25,000 therms.
- Projects with Investigation or Verification Report energy savings exceeding 12.5% of total annual electric and/or natural gas usage.
- When the Service Provider performs implementation of ECMs.

Resource Innovations reserves the right to randomly inspect any projects.

### 3.6. Implementing Subcontractors

Resource Innovations will utilize the following implementing subcontractor(s) to fulfill a portion of Service Provider management. These tasks are outlined in the table below:

**Table 3-2. Implementing Subcontractor Roles**

Implementing Subcontractor	Role
The JPI Group	New Service Provider Onboarding
	Service Provider Training
	Service Provider Invoice Processing
National Energy Improvement Fund (NEIF)	Customer Financing Options

- New Service Provider Onboarding
  - All new Service Providers are required to complete onboarding training, offered by The JPI Group, to become familiar with offering requirements and processes.
  - The JPI Group will provide business development support until the Service Provider submits their first application, at which point management and support will be transferred to a Resource Innovations Project Coordinator.
- Service Provider Training
  - Supplemental training, offered by The JPI Group, will be administered on a case-by-case basis. Training topics include, but are not limited to, business development, project coordination, program rules and guidelines, marketing support, etc. Reach out to your Project Coordinator if you’re interested in additional program-related training.
- Service Provider Invoice Processing
  - Submit invoices to [RCxInvoices@resource-innovations.com](mailto:RCxInvoices@resource-innovations.com).
  - Invoice processing and payment will be managed by The JPI Group.
- Customer Financing Options
  - In coordination with Resource Innovations, NEIF offers businesses, non-profits, municipal, and multifamily properties access to trusted, transparent and affordable monthly payment options for upgrades that make businesses more energy efficient.
  - For more information visit [www.neifund.org/resource-innovations-retro-commissioning-illinois](http://www.neifund.org/resource-innovations-retro-commissioning-illinois).

## 4. Customers

### 4.1. Customer Participation Benefits

Customers receive the following benefits as part of their participation in the RCx Flex offering:

- Site investigations conducted by approved Service Providers resulting in an Investigation Report detailing recommended ECMs, at no cost to the customer.
- Technical support during implementation from the Service Provider to ensure ECMs are installed correctly and any needed adjustments are made.
- Verification Report detailing the results and energy savings for the project.
- Incentives may be available for verified energy savings.

### 4.2. Eligibility

To apply for an RCx Flex study, a customer must be served by ComEd, have a peak demand rate greater than 100 kW, and not have opted out per the Customer Eligibility Search Tool in the [Energy Efficiency Service Provider Portal](#). Service Providers are encouraged to reach out to Resource Innovations to confirm customer eligibility. Eligible customers must also meet these guidelines:

- Electrical usage of 500,000 kWh per year or more.
- Customer staff willing to support the study and are interested in implementing identified ECMs.
- No major capital or construction projects planned within one year of Application acceptance.
- No expected change in building ownership or management within one year of project acceptance.
- Commitment to spend a specified amount on implementation of ECMs identified through the RCx Flex study.
- Projects may also be eligible to include natural gas in the scope of the project if the following criteria are met:
  - Natural Gas is the main heating source.
  - Natural Gas Account Number is provided on the application and the account is active.
  - The natural gas utility is Nicor Gas.
  - Eligibility confirmed prior to Application acceptance.
- Customers in certain towns served by municipal electric authorities may not be eligible as they do not pay into the ComEd energy efficiency fund, however this does not apply to all addresses in these towns. To confirm account eligibility please provide the customer address to Resource Innovations if located in the following towns:
  - Naperville, St Charles, Batavia, Geneva, Winnetka, Rochelle and Rock Falls.
- Past participants who had a project verified in 2018 or earlier are eligible to submit a new application now. The table below outlines when past participants are eligible to submit a new application. This table only applies if the new application has a similar scope of work (e.g. ECMs, systems, areas) as the previous project. An application with a new scope of work is eligible to participate under RCx Flex at any time.

**Table 4-1. Past Participant Eligibility**

Initial Project Verified	Eligible to Submit New Application
2019	2027
2020	2028
2021	2029
2022	2030
2023	2031

Initial Project Verified	Eligible to Submit New Application
2024	2032
2025	2033

### 4.3. Customer Responsibilities

Once accepted into the RCx Flex offering the customer will be responsible for the following items:

- Become familiar with the RCx Flex offering and process.
- Commit facility staff time over the duration of the RCx Flex study.
- Collaborate with the Service Provider in identifying ECMs by providing facility access, staff interviews, BAS review, data acquisition, contractor invoices, energy bills, etc.
- Acquire quotes from contractors by working with the Service Provider and reserving funding for ECM implementation.
- Implement ECMs within 60 days of receiving recommendations from the Service Provider.
- Meet the minimum spending requirement.

### 4.4. Customer Satisfaction

Customer satisfaction is one of the top priorities of the RCx Flex offering. As such, it is the Service Provider’s responsibility to professionally and accurately represent the offerings. Service Providers are expected to respond to all customer inquiries in a timely fashion and communicate any project issues to Resource Innovations. Failure to meet expectations could result in removal from the RCx Flex offering and/or a transfer of a project to another Service Provider.

### 4.5. Implementation Commitment

The Implementation Commitment is the customer’s commitment to implement all mutually agreed upon Service Provider identified ECMs detailed in the Investigation Report with a simple payback of 1.5 years or less. Simple Payback is based upon electrical savings and implementation costs. The commitments, listed in the table below, are set according to the initial target electric energy savings.

**Table 4-2. Implementation Commitment**

Energy Savings Target (kWh)	Implementation Commitment (\$)
kWh ≤ 250,000	Lesser of Cost for measures with <1.5 year payback or \$1,000
250,000 < kWh ≤ 500,000	Lesser of Cost for measures with <1.5 year payback or \$5,000
500,000 < kWh ≤ 750,000	Lesser of Cost for measures with <1.5 year payback or \$10,000
kWh > 750,000	Lesser of Cost for measures with <1.5 year payback or \$15,000

### 4.6. Incentives

A customer incentive may be available for projects completed in the current calendar year. The incentive is the lesser of:

- The amount of verified kWh multiplied by \$0.04
- 100% of the implementation costs

The customer incentive will be paid out upon approval of the Verification Report.

## 4.7. BOC Training

Resource Innovations recommends that at least one staff member from the customer project team complete Level I or Level II of the Building Operator Certification (BOC) training program within 12 months of the RCx Flex verification meeting to ensure measure persistence. The BOC training program is administered by Midwest Energy Efficiency Alliance which offers two (2) levels of training for building engineers and maintenance personnel:

- Level I: Building Systems Maintenance
  - Topics covered: Fundamentals of HVAC controls, lighting, indoor air quality, and low cost operational improvements
- Level II: Equipment Troubleshooting and Maintenance
  - Topics covered: Whole building scoping for operational improvements, building commissioning, and optimizing HVAC controls for energy efficiency

The cost for each session is \$1,400 which includes all class materials, books and certificate of completion. The Midwest Energy Efficiency Alliance (MEEA) will provide a \$1,400 tuition-reimbursement payment to students that complete the training course and earn the Training Certificate of Completions (TCOC) if they work at an eligible facility serviced by one of the participating utilities: Ameren, ComEd, Nicor Gas, Peoples Gas and North Shore Gas. Additionally, ComEd will provide a labor incentive, \$0.0137 per square foot capped at the participant's labor rate multiplied by hours spent in training, not to exceed \$6,850, to participants who complete the course and earn the TCOC if they work at an eligible facility within the ComEd territory.

More information and to register for a session can be found at [www.theboc.info](http://www.theboc.info).

## 5. Service Providers

All RCx Flex offering activities and services will be delivered through approved Service Providers.

### 5.1. Service Provider Benefits

The Service Provider receives the following benefits as part of their participation in the RCx Flex offering:

- Milestone payments upon Application acceptance, Investigation Report approval, and Verification Report approval.
- Marketing support and promotional materials.
- Service Provider's company information listed on the ComEd online directory of contractors. RCx Flex-related training.
- Calculation tools for use in quantifying energy savings.
- Ongoing support and oversight.

### 5.2. Service Provider Responsibilities

The Service Provider will primarily be responsible for their own promotion of the RCx Flex offering. Resource Innovations will provide support and training on various RCx Flex offering topics such as engineering, outreach, and marketing.

The Service Provider shall perform all services in compliance with the Contractor Participation Agreement and with this manual. The manual provides the RCx Flex offering rules, customer qualifications, participation process, and project steps required to be followed by the Service Provider. Below is a summary of the Service Provider's responsibilities:

- Complete all RCx Flex participation requirements and submit all required documentation to Resource Innovations, as requested and specified in the Contractor Participation Agreement.
- Ensure all staff performing services complete on-boarding training and are identified in the Key Personnel Forms. (located on the Service Provider Portal at [comedrcx.eeserviceproviders.com](http://comedrcx.eeserviceproviders.com))

- Promote the RCx Flex offering in compliance with the Promotional Rules and Key Messaging Guidelines for Authorized Providers as outlined in this manual.
- Provide services to eligible ComEd customers only.
- Accurately inform customers about the RCx Flex offering and qualifying equipment, incentive amounts, participation process, and eligibility requirements and provide customers with the appropriate approved materials.
- Perform all work in a safe manner in compliance with safety related control devices and protocols required to perform the scope of work; comply with all applicable laws, regulations and standards as well as any other related safety requirements.
- Invoice the RCx Flex offering in an accurate and timely manner to [RCxInvoices@resource-innovations.com](mailto:RCxInvoices@resource-innovations.com) when milestones have been approved by Resource Innovations.
- Have appropriate resources to perform work, including:
  - Staffing and cash-flow.
  - A comprehensive execution plan for each customer participating in the RCx Flex offering.
  - Communication plan to ensure Service Provider is responsive with customer leads, RCx Flex offering inquiries and milestone deadlines.
- When assembling RCx Flex reports:
  - Use and follow the available ComEd branded templates and M&V Guidelines.
  - Leverage available standard calculators or Excel based spreadsheets to support savings for ECMs.
  - Review commonly found ECMs as included in the ECM Form and recommend accordingly.
- Communicate with Resource Innovations, customers and ComEd in a professional and timely manner.
- Cooperate and participate in project inspections before, during, and/or after project installation.

### 5.3. Project Assignments

Resource Innovations will authorize the Service Provider to complete RCx Flex services for a customer by issuing them a work authorization. The Service Provider will not begin work on any project until they have received a written work authorization (email is sufficient) from Resource Innovations specifying the work authorized for completion.

The Service Provider acknowledges that project savings targets will be utilized throughout all phases of a project to evaluate the cost-effectiveness of a project and its qualification for offering incentives. The Service Provider acknowledges that the project information and estimates provided by the Service Provider will contribute to and be relied upon by Resource Innovations in calculating the savings targets and proposed scope of work and costs. If at any time during a project, a project's estimates for savings potential fail to meet or exceed the project's savings target or if a project is determined to be unfeasible due to uncertainties in energy savings opportunities, customer support, or for any reason Resource Innovations determines to be in the best interests of ComEd, Resource Innovations may reject a project for participation in the ComEd RCx Offering, revise the project's proposed scope of work and costs, or cancel any further work to be completed on the project.

Resource Innovations will only be obligated to pay for work up to the date of cancellation that has been authorized and completed in accordance with the terms of the relevant work authorization. Resource Innovations will issue any revisions to authorized work or payment amounts to the Service Provider in a modification. The Service Provider must accept all work authorizations issued by Resource Innovations to the Service Provider in writing (email is sufficient) within two (2) business days of the date issued. Any additional or conflicting terms in the Service Provider's acceptance will be rejected and excluded from the work authorization. The Service Provider's performance of authorized work specified in a Work Authorization or change order will be deemed as the Service Provider's acceptance of the terms and work despite a failure to accept as required above.

If the term of any one or more work authorizations continues beyond the termination date of the Service Provider's agreement with Resource Innovations, the terms and conditions of the agreement shall continue to apply to those work authorizations until final completion and acceptance of the work.

## 5.4. Safety

The RCx Flex offering follows a “hands-off” policy to ensure the highest level of safety when performing spot measurements, data logger deployment/removal, functional testing or other potentially hazardous work. The RCx Flex offering requires building staff or a building hired electrician to support the efforts of the Service Provider when hazardous work is performed. In the event of an accident Resource Innovations must be notified within 1.5 hours of the occurrence.

The Service Provider safety program as referenced in the Contractor Participation Agreement must include the below minimum provisions:

- A safety manual addressing the following topics along with proper measures for training and adhering to:
  - Lock-Out Tag-Out Procedures
  - Personal Protection Equipment
  - Fire Retardant Clothing
  - Ladder Safety
  - Lift and Aerial Safety
  - Specific Safety Related to Electrical Work
  - HAZCOM
  - Blood-Borne Pathogens
- Safety policy and procedures which address all required local, state and federal occupational safety and health standards and trade-specific licensing and certification requirements and a safety officer responsible for RCx Flex implementation.
- Safety rules and safe working practices which must be followed by employees at any location for the prevention of illness and injury.
- Processes addressing identification, prevention and control, and communication of safety and health hazards.
- Employee training which includes addressing site-specific safety and health requirements.
- Tools, instruments and safety equipment that meet minimum safety ratings which are available and provided to employees.
- Requirements for the use of appropriate personal protective equipment in all operations where there is an exposure to hazardous conditions or where regulations indicate the need for using such equipment.
- An injury and incident response and reporting procedure including Whistleblower protections and emergency action planning and enforcement procedures to address violations.

## 5.5. Commitment Level

Service Providers are required to submit, and have accepted, at least one application within the RCx Flex or MBCx offering by December 31 of each calendar year to be eligible for renewal the following year, starting January 1.

## 5.6. Scoring

To provide feedback on Service Provider performance within the RCx Flex offering, a scoring system is used to fairly assess the services provided and encourage constructive feedback and continuous improvement. Service Providers will be held accountable to the following key performance indicators:

### Key Performance Indicators

- Customer satisfaction
- Quality of deliverables
- Adhering to project schedule
- Applications submitted
- Energy savings verified
- Accuracy of annual energy savings forecast
- Overall value provided

At the beginning of each calendar year, Service Providers will be required to submit a forecast estimating the number of electric and natural gas energy savings they anticipate verifying that year. Service Providers will be given an opportunity to revise their forecast at least once per year.

A poor score may result in removal from the RCx Flex offering. Complete details of the scorecard are available upon request.

## 6. Project Schedule

Completion of RCx Flex projects in a timely manner is crucial to program success. Not all projects will follow the same timeline, and as such, the timeline listed below should be adjusted as needed to fit each individual project. Resource Innovations will request specific deliverable submission dates from the Service Provider at the start of each new phase. During each phase, Resource Innovations should be notified if the Service Provider expects more than the default amount of time to complete the phase.

**Table 6-1. Project Schedule**

Phase	Assigned Party	Task	Allotted Days	Due Date
Investigation	Joint	Kick-off meeting		01.01.26
	Service Provider	Perform assessment and identify ECMs	56	
	Joint	Recurring conference calls: Identify ECMs for immediate implementation	Ongoing	
	Service Provider	Develop and submit calculations and INV Report to Resource Innovations		02.26.26
	Resource Innovations	Review calculations and INV Report	7	
	Service Provider	Review calculations and INV Report	7	
	Resource Innovations	Request revisions of calculations and INV Report if needed	2	
	Service Provider	Revise calculations and INV Report if needed	2	
	Service Provider	Present INV Report to customer		03.16.26
	Customer	Customer reviews INV Report	7	
	Joint	INV Report review meeting; Customer selects ECMs for implementation		03.23.26
	Customer	Sign ECM Form	7	03.30.26
Implementation	Joint	Recurring conference calls continue	Ongoing	
	Service Provider	Provides technical support	Ongoing	
	Customer	Leads implementation of ECMs and notifies Service Provider and Resource Innovations upon completion	60	05.29.26
Verification	Service Provider	Perform verification of installed ECMs	42	
	Service Provider	Update and submit calculations and VER Report to Resource Innovations		07.10.26
	Resource Innovations	Review calculations and VER Report	7	
	Service Provider	Review calculations and VER Report	7	
	Resource Innovations	Request revisions of calculations and VER Report if needed	2	
	Service Provider	Revise calculations and VER Report if needed	2	
	Service Provider	Present VER Report to customer		07.28.26
	Customer	Customer reviews VER Report	7	
Joint	VER Report review meeting		08.04.26	

Note: any date falling on a weekend or holiday shall be assumed the following business day

## 7. RCx Flex Offering Phases

The RCx Flex offering consists of four (4) phases: Application, Investigation, Implementation, and Verification.

### 7.1. Application Phase

#### Overview

The Application Phase includes the business development efforts to identify and select a cost effective RCx Flex offering participant. The Service Provider must work with customers to complete and sign the application, set reasonable energy savings target(s), and participate in technical review calls with the customer and Resource Innovations as needed. The Application Phase will conclude with a notification to the Service Provider and customer of application acceptance or deferral.

- Application Phase (4 weeks)
  - Complete and submit signed application to Resource Innovations via Europa
    - Deliverable: (1) Application
  - Participate in technical review calls
  - An acceptance or deferral notice will be communicated

#### Application Review

A pre-application screening of the facility and facility staff should be completed prior to submitting an application for review. Performing a proper screening will limit customer, Service Provider, and Resource Innovations investment for an application that does not meet the RCx Flex offering requirements. Service Providers should complete a two-to-four hour site visit to gain cursory knowledge of the facility and work with the customer and facility staff to determine if a successful RCx Flex study is feasible.

Resource Innovations will review completed applications upon submission via Europa. In addition to the customer eligibility requirements described above, preference will be given to facilities with the below characteristics:

- The facility should have accessible and up-to-date building documentation and records
- The facility should have an above average EUI (kBtu/ft<sup>2</sup>) compared to buildings of the same class and/or have a low Energy Performance Rating from ENERGY STAR Portfolio Manager
- The facility should exceed 100,000 ft<sup>2</sup> in air-conditioned floor space and electric energy savings target greater than 50,000 kWh
- Building leased occupancy should be greater than or equal to 40%
- The facility should be free of major energy system problems requiring capital repairs or replacements and have no planned major system renovations or retrofits
- The facility should have an existing and functional building automation system (BAS) with direct digital control (DDC)
- The customer and their O&M staff should express a commitment to be actively involved in the study including the following:
  - Providing access to the facility
  - Providing time for facility personnel to interface with the Service Provider
  - Assisting with collection and reporting of facility data

If additional clarification is needed to make a decision on application acceptance or deferral, a call may be requested between Resource Innovations, the Service Provider and/or customer.

## Service Provider Selection

Customers are required to utilize an approved RCx Flex offering Service Provider to be eligible to participate. Except in limited cases (e.g., when a Service Provider is unable to provide the required RCx Flex services), applications which were brought to the program through the efforts of a Service Provider will be assigned to that Service Provider. Resource Innovations will assign a Service Provider to customers who do not already have one. However, in all cases, customers are free to request services from other approved Service Providers.

Service Providers who provide implementation services to a customer for ECMs recommended as part of the RCx Flex study must notify Resource Innovations to accompany them on their verification site visit as an inspection. In situations where Service Providers conduct the verification site visit without Resource Innovations present they will forfeit the verification payment.

## Savings Target(s)

To help ensure that the project will result in cost-effective savings for ComEd, Resource Innovations will work with the Service Provider to establish an annual electric, and if eligible, natural gas savings target(s) for the facility. The savings target(s) will be a function of, but not limited to, the facility type, size and annual energy usage.

## 7.2. Investigation Phase

### Investigation Overview

The Investigation Phase includes a comprehensive assessment of the customer's facility resulting in an Investigation Report. The goal of the Investigation Phase is to identify ECMs and present them to the customer outlining estimated costs and energy savings. The Service Provider should gather information needed to develop energy saving calculations by performing activities such as conducting a site visit, spot measuring equipment, collecting and reviewing trend data, and/or interviewing the facility staff. More information regarding investigation methods can be found in the M&V Guidelines.

- Investigation Phase (8 weeks)
  - Using authorized field personnel, perform on-site work and identify ECMs
  - Collect quotes for installation cost of recommended ECMs
  - Following M&V Guidelines, develop energy calculations and submit Investigation Report to Resource Innovations via Europa
  - Deliverables:
    - Investigation Report
    - Calculation files
    - Trend files
    - Supporting documentation
      - (e.g. implementation quotes, equipment screenshots)
  - Participate in bi-weekly update calls
  - Upon approval of Investigation Report:
    - Submit invoice to Resource Innovations via email at [RCxInvoices@resource-innovations.com](mailto:RCxInvoices@resource-innovations.com)
    - Deliver Investigation Report to customer and attend Investigation review meeting
  - Follow up with customer to select ECMs for Implementation
  - Submit signed ECM Form to Resource Innovations via Europa

## Investigation Report

The Investigation Report describes the customer's facility, operations, systems, equipment, and controls as they currently exist, and provides insight into the identified ECMs. The Investigation Report contains initial findings of the Service Provider's recommended ECMs. The report is used to educate the customer on the impacts of the implemented ECMs located at their facility. An approved report must be presented to the customer and a meeting scheduled to review results. More information regarding the report can be found in the report template.

## Signing the ECM Form

Following the approval of the Investigation Report it is the Service Provider's responsibility to follow up with the customer to select ECMs to be installed at their facility. Customers can either sign the Investigation ECM Form or confirm via email the selected measures for implementation. Upon selection the Service Provider must notify Resource Innovations and receive approval prior to proceeding into the Implementation Phase.

## 7.3. Implementation Phase

### Implementation Overview

The Implementation Phase is when installation of selected ECMs occurs. The goal of the Implementation Phase is to fully install all agreed-upon ECMs and ensure they are ready for the Verification Phase. The Service Provider works hand-in-hand with the customer's implementation team to install the selected ECMs and provide recommendations to address any issues. The implementation team consists of the facility engineers, operational staff, and any mechanical, electrical, or controls contractors. Implementation of the ECMs is the responsibility of the customer, however, the Service Provider is required to provide technical support throughout the phase.

- Implementation Phase (8 weeks)
  - Provide technical support to customer implementation team
  - Participate in bi-weekly update calls
  - Ensure proper ECM implementation
  - Notify Resource Innovations after implementation is complete

### Implementation Review

The customer is responsible for fully funding implementation of selected ECMs and activities that may include contracting with mechanical/electrical contractors, obtaining professional engineering designs, controls modifications, and installation of equipment that is required for each ECM. The customer may choose to solicit these services from the Service Provider, a third party, or perform installation using in-house labor. If the Service Provider performs the implementation then they must have Resource Innovations accompany them on the verification site visit as an inspection.

The Service Provider is responsible for providing implementation assistance to customers to guide them from a recommended solution to the physical installation of each ECM. These activities may take the form of troubleshooting recommended control sequences, suggesting alternative ECM strategies, commenting on alternative design solutions and answering technical questions. The Service Provider should be available on site or by phone throughout the phase and be in close communication with any third parties installing ECMs.

## 7.4. Verification Phase

### Verification Overview

The Verification Phase includes a review of the implemented ECMs resulting in a Verification Report. The goal of the Verification Phase is to confirm installation of selected ECMs and quantify actual energy savings, making adjustments to the energy saving calculations from the Investigation Phase as needed. The Service Provider should begin the Verification Phase by confirming installation of selected ECMs. This can be achieved by conducting visual inspections, spot measuring equipment, collecting and reviewing trend data, and/or interviewing the implementation team. More information regarding verification methods can be found in the M&V Guidelines.

- Verification Phase (8 weeks)
  - Using authorized field personnel, perform on-site work and verify implemented ECMs
  - Following M&V Guidelines, update energy calculations and submit Verification Report to Resource Innovations via Europa
  - Deliverables:
    - Verification Report
    - Measure Persistence Guide
    - Calculation files
    - Trend files
    - Supporting documentation
      - (e.g. implementation invoices, equipment screenshots)
  - Participate in bi-weekly update calls
  - Upon approval of Verification Report:
    - Submit invoice to Resource Innovations via email at [RCxInvoices@resource-innovations.com](mailto:RCxInvoices@resource-innovations.com)
    - Deliver Verification Report to customer and attend Verification review meeting

### Verification Report

Any discrepancies found between the estimated and actual energy savings calculations must be documented in the Verification Report and supported by sufficient trend data. If discrepancies exist, Resource Innovations may require that all verification activities be halted until the customer completes full and proper installation of ECMs. The energy savings must ultimately be recalculated, and the revised energy savings for each ECM presented in the Verification Report.

The Verification Report is an updated version of the Investigation Report with verified results of implemented ECMs. The report is used to educate the customer on the impacts of the implemented ECMs located at their facility. The approved report must be presented to the customer and a meeting scheduled to review results. More information regarding the report can be found in the report template.

The Measure Persistence Guide serves as a reference for maintaining and correcting ECM sequence of operations if they fall out of calibration to ensure lasting measure persistence.

## 7.5. Third-Party Evaluation

The RCx offering is regulated by the ICC to evaluate the effectiveness of ratepayer-spent funds. If one of your projects is selected for a third-party evaluation, please reach out to your project coordinator for more information.

## 8. Fees and Invoicing

### 8.1. Service Provider Fees

Service Provider fees for the RCx Flex offering are paid out on a dollar per kWh basis with the following conditions:

- The Application Acceptance fee is calculated by multiplying the target kWh savings by \$0.01/kWh.
- The Investigation Report fee is calculated by taking the lesser of the target and Investigation Report kWh savings and multiplying by \$0.06/kWh, capped at \$45,000.
- The Verification Report fee is based on the verified kWh:
  - The fee equals the verified kWh savings multiplied by \$0.18/kWh.
  - The Verification Report fee equals the above value minus the Application Acceptance and Investigation Report fees.

For projects with natural gas opportunities an additional Service Provider fee may be available. There is no application acceptance fee for target therm savings. The additional fee is calculated as follows:

- For Nicor customers:
  - The Verification Report fee is calculated by multiplying the Verification Report therm savings by \$0.350/therm

Fees include all taxes and expenses. Payments are distributed as detailed below:

**Table 8-1. Payment Distribution**

Milestone Completed	Electric	Natural Gas
		Nicor Gas
Application Acceptance	\$0.01/kWh	-
Investigation Report	\$0.06/kWh	-
Verification Report	\$0.18/kWh	\$0.35/therm

In addition to the above, Savings Tier Fees are available for the first and second halves of the calendar year. Service Providers may be eligible for an additional fee based on cumulative kWh savings. To qualify:

- First Half: Service Providers must submit 1st draft Verification Report(s) by June 5, 2026 and have Verification Report(s) approved between January 1, 2026 and June 30, 2026
- Second Half: Service Providers must submit 1st draft Verification Report(s) by December 4, 2026 and have Verification Report(s) approved between July 1, 2026 and December 31, 2026

Verification Report deliverables will be reviewed on a first-come, first-served basis. Deliverables submitted after June 5, 2026 (first half) or December 4, 2026 (second half) are at risk of not being approved in time for their respective time frame.

The maximum Savings Tier Fee a Service provider can achieve in a given calendar year is \$100,000 (\$50,000 for the first half and \$50,000 for the second half).

**Table 8-2. Savings Tier Fees**

Tier	Tier Levels (kWh)	SP Amount (\$)
1	3,000,000 kWh	\$50,000
2	2,000,000 kWh	\$33,000
3	1,000,000 kWh	\$14,000
4	500,000 kWh	\$5,500
5	250,000 kWh	\$2,500

## 8.2. Invoices

Service Providers must submit invoices no later than 15 business days after notification of milestone approval by Resource Innovations. If an invoice is not submitted within this time frame, Resource Innovations will reduce the final milestone payment by 0.5% of the original approved amount for every five (5) business days the invoice is late. Resource Innovations reserves the right to reject payment of invoices received more than six (6) months after milestone approval. Invoices must be submitted to Resource Innovations by email at [RCxInvoices@Resource-Innovations.com](mailto:RCxInvoices@Resource-Innovations.com).

The following items are expected to be included in the invoice for payment processing:

- Invoice date
- Invoice number
- Service Provider name
- Task Order Number
- Period covered by invoice
- Currency: USD
- Payment terms: Net 30
- Service Provider principal contact
- Bill to address
- Resource Innovations principal contact
- Remit to address
- Project number
- Project name
- Payment milestone
- Fee calculation
- Billed amount

In the event that the Service Provider is performing Services under more than one Task Order Number, the Service Provider must invoice separately for each Task Order Number. Resource Innovations will be entitled at all times to offset any amounts owed by the Service Provider to Resource Innovations in connection with a Task Order Number or any other agreement between the Service Provider and Resource Innovations.

The Service Provider will be paid by direct deposit to the account authorized by the Service Provider.

## 8.3. Sample Invoice

Figure 8-1. Sample Invoice

<b>Invoice Date:</b>				
<b>Invoice Number:</b>				
<b>Service Provider Name:</b>				
<b>Task Order Number:</b>	AVXXXXX			
<b>Period Covered by Invoice:</b>				
<b>Currency:</b>	USD			
<b>Payment Terms:</b>	Net 30			
<b>Service Provider Principal Contact:</b>	<b>Resource Innovations Principal Contact:</b>			
	Abdul Hadi Ayoub			
<b>Remit To Address:</b>	<b>Bill To:</b>			
	400 N. Michigan Ave, Suite 600, Chicago, IL 60611			
Project Number	Project Name	Payment Milestone	Fee Calculation	Payment Amount
26-0000	Sample Building	Application	225,000 kWh x \$0.01/ kWh	\$2,250.00
<b>Total Invoice Amount:</b>				\$2,250.00

## 9. Marketing and Outreach

### 9.1. Marketing and Communications Support

These communication tools are available to authorized Service Providers to support in-field sales efforts:

#### Promotional Rules

Aiding you to accurately and effectively promote the RCx offering, these rules will help you maximize ComEd co-branding and the promotion of your affiliation with the RCx offering while adhering to ComEd marketing standards. The promotional rules are included in your Contractor Participation Agreement and located on the Service Provider Portal. Authorized Service Providers are required to follow the promotional rules. The promotional rules are meant to provide Service Providers maximum ability to promote the RCx offering while giving clear direction on what they can and cannot say, write, or promote about the RCx offering. Service Providers who do not follow the promotional guidelines may be removed from the RCx offering so it is imperative that all members of a Service Provider's staff understand and follow the guidelines outlined in the document. Any questions should be directed to the Service Provider's **main point of contact**.

#### Key Messaging Guidelines

These guidelines have been created to support authorized Service Providers in their messaging of the RCx Flex offerings to customers. Refer to the following guidelines when developing materials to share with customers or community organizations. For a detailed list of Service Provider promotional rules that must be adhered to as a Service Provider with the RCx Flex offerings, please see the Contractor Participation Agreement.

## Audience and Key Messaging

Consistent messaging is critical when communicating the RCx Flex offerings to potential and current customers. These key messages are designed as a reference for conveying verbal and written communications to customers. Below please find details on how to find customers to target, followed by a brief overview of the RCx Flex offerings marketing key messages. When talking with customers keep it simple and try not to confuse them—we understand that the back end of the utility programs can get complicated, but to the customer they should be as seamless as possible.

Please note: The customer is referred to as “you” in several sections of this document to facilitate using this as a script when speaking to the customer.

## Ideal Project Profile

Project characteristics

- Motivated customer interested in energy efficiency.
- Customer has time available for energy efficiency improvements.
- Customer expresses a need for help to identify improvements.
- Customer expresses a need for an incentive to fund the initial study.

## General Messaging

RCx Flex optimizes the energy performance of your facility to improve your facility’s bottom line while ensuring a comfortable environment for occupants. Receive a fully-funded study performed by an authorized Service Provider. Services are provided to identify low-cost operational improvements to your energy-using systems. You may also qualify for an incentive based on the energy savings achieved at your facility. To receive the study, participants must commit to spending \$1,000 to \$25,000 on low-cost energy-saving improvements. The commitment level depends on your project size.

Saving Energy is as Easy as 1, 2, 3:

1. Select a Service Provider from our ComEd Energy Efficiency Service Providers list and submit an application.
2. Receive personalized energy-saving recommendations. Work with your Service Provider to gather building system performance data and identify low-cost opportunities for operational improvements tailored for your facility.
3. Implement RCx Flex improvements of your choice and start saving money and energy.

## Additional Messaging

- The Illinois utility energy efficiency programs are rate-payer funded. Electric and natural gas utility customers pay into the fund marked as “Energy Efficiency Program” on your bill.
- The ComEd® Energy Efficiency Program and authorized Service Providers are focused on providing high customer satisfaction while attaining significant energy reductions for your facility.
- Your selected Service Provider will assist you every step of the way to help you achieve energy savings for your business.

## Awards and Rankings from ComEd

YOU MAY NOT:

- Utilize any language that refers to the Request for Qualification (RFQ), your company’s selection and how many companies were evaluated through the RFQ process.
- Utilize any language that refers to your rank in terms of savings generated, incentives paid out, or quantity of projects.

## Service Provider Portal

Your status as an authorized Service Provider with the ComEd RCx Flex offering grants you access to many RCx Flex offering resources. From the Service Provider Portal you can:

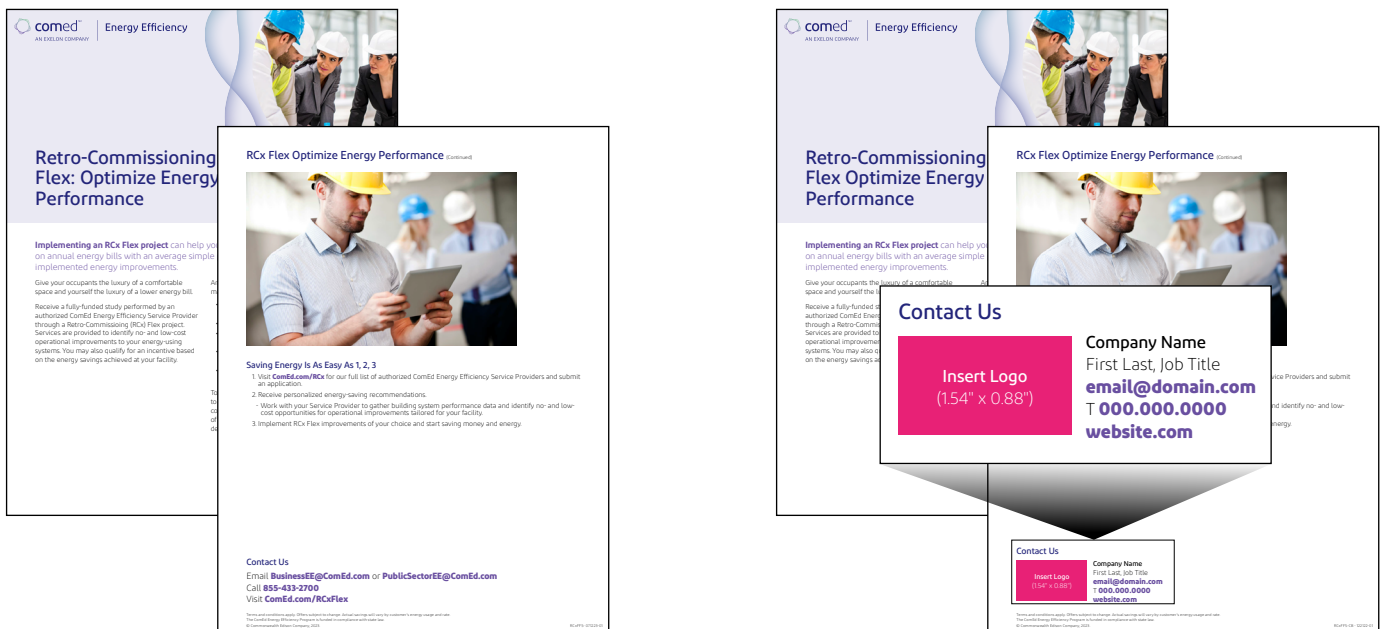
- View upcoming events on the event calendar
- View past communications
- Access resources
- Access Europa Project Management Tool
- View trainings and webinars
- View, download, and order RCx Flex offering collateral through the marketing page
- Access historical data

Visit [comedrcx.eserviceproviders.com](http://comedrcx.eserviceproviders.com) and use your provided credentials to access the site.

## Marketing Materials Toolkit (MMT)

From the Service Provider Portal's Marketing Material Toolkit page, you have the ability to order RCx Flex offering materials produced with your company name, logo and contact information. These materials will help directly connect a customer with the RCx Flex offerings and your company.

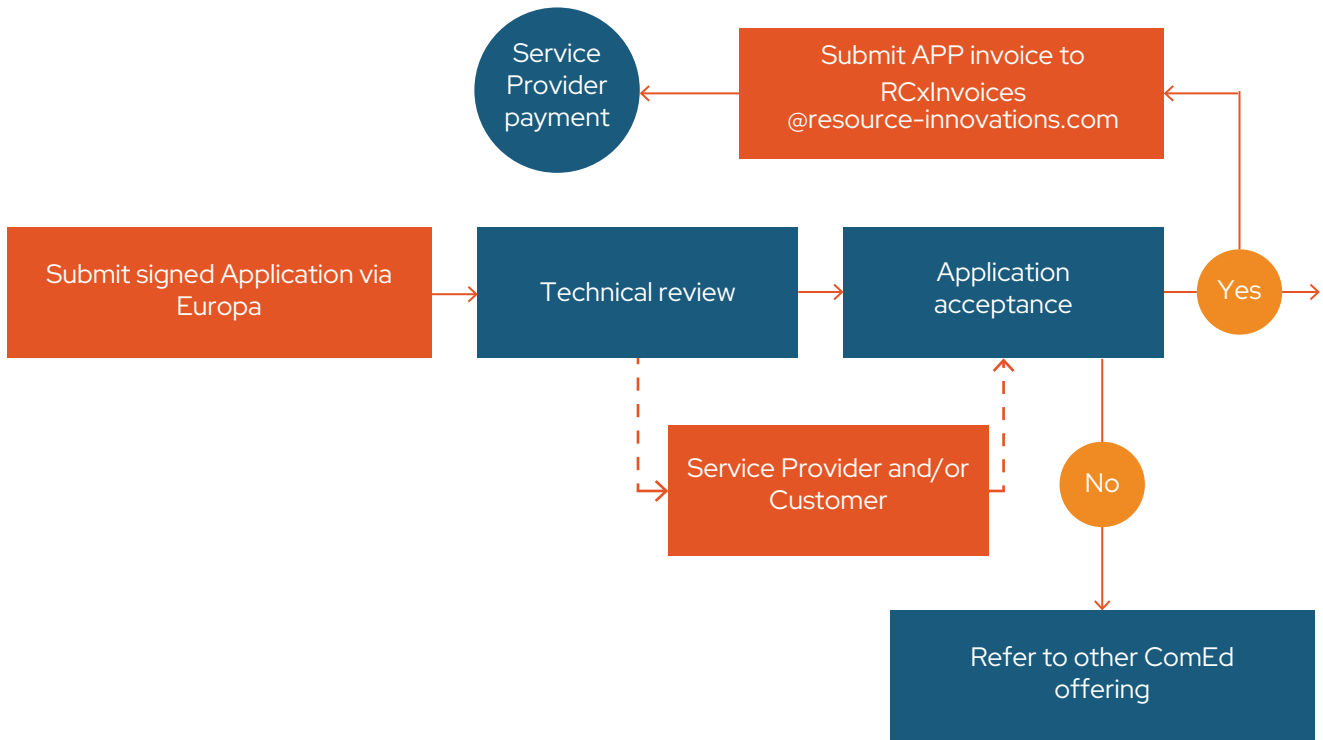
Figure 9-1. Marketing Materials Toolkit Co-Branding Example



# 10. RCx Flex Offering Flow Charts

## 10.1. Application (APP) Phase

### Application (APP) 1 Week

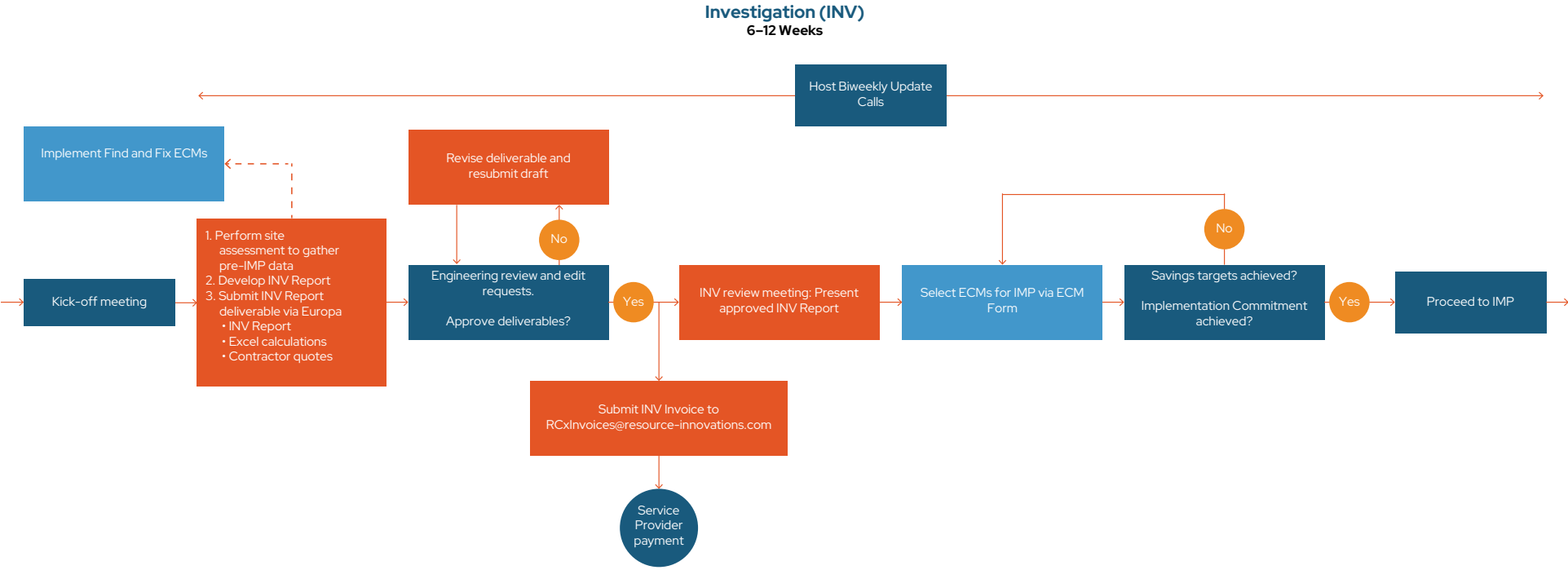


Deliverables: Signed application  
Owner: Resource Innovations, Service Provider, Customer

#### Legend



# 10.2. Investigation (INV) Phase

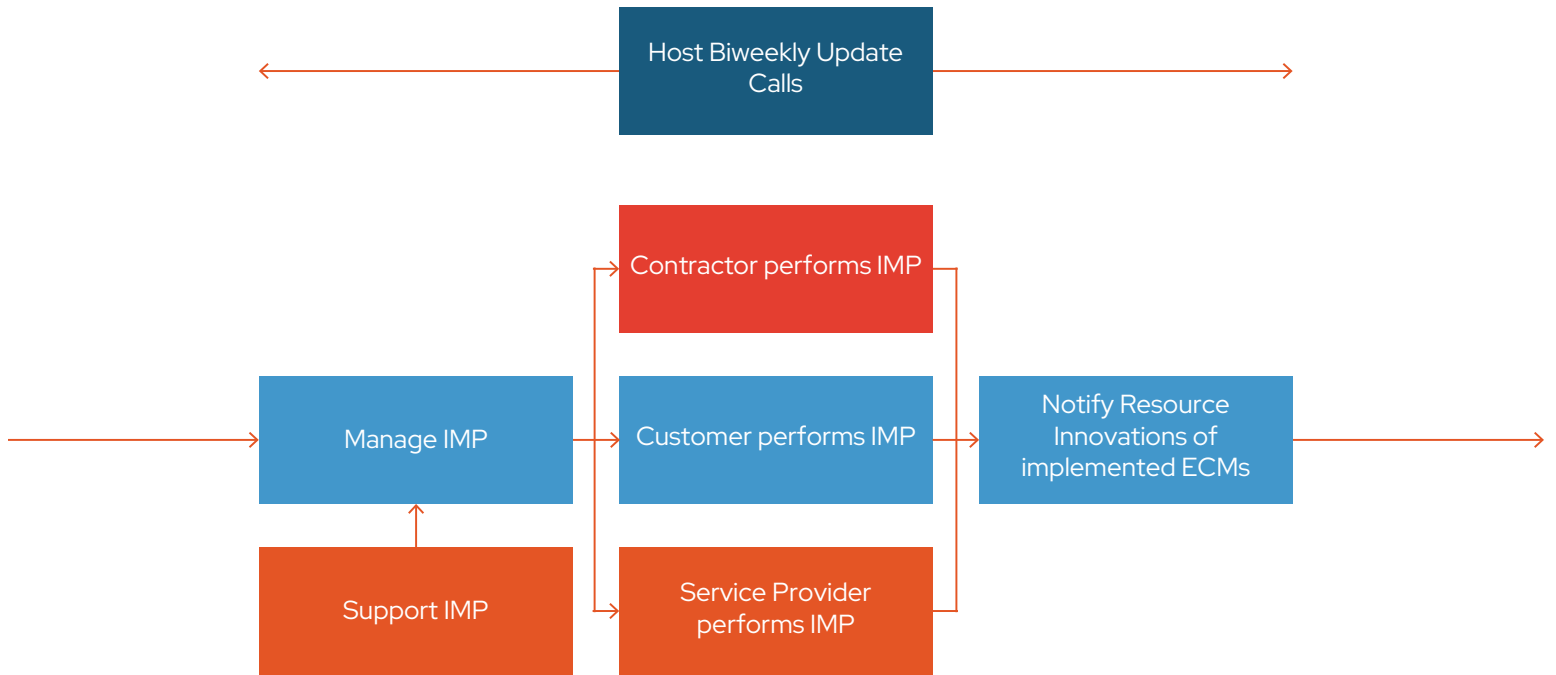


Deliverables: Investigation Report, Completed ECM Form  
Owner: Resource Innovations, Service Provider, Customer



## 10.3. Implementation (IMP) Phase

### Implementation (IMP) 6-8 Weeks



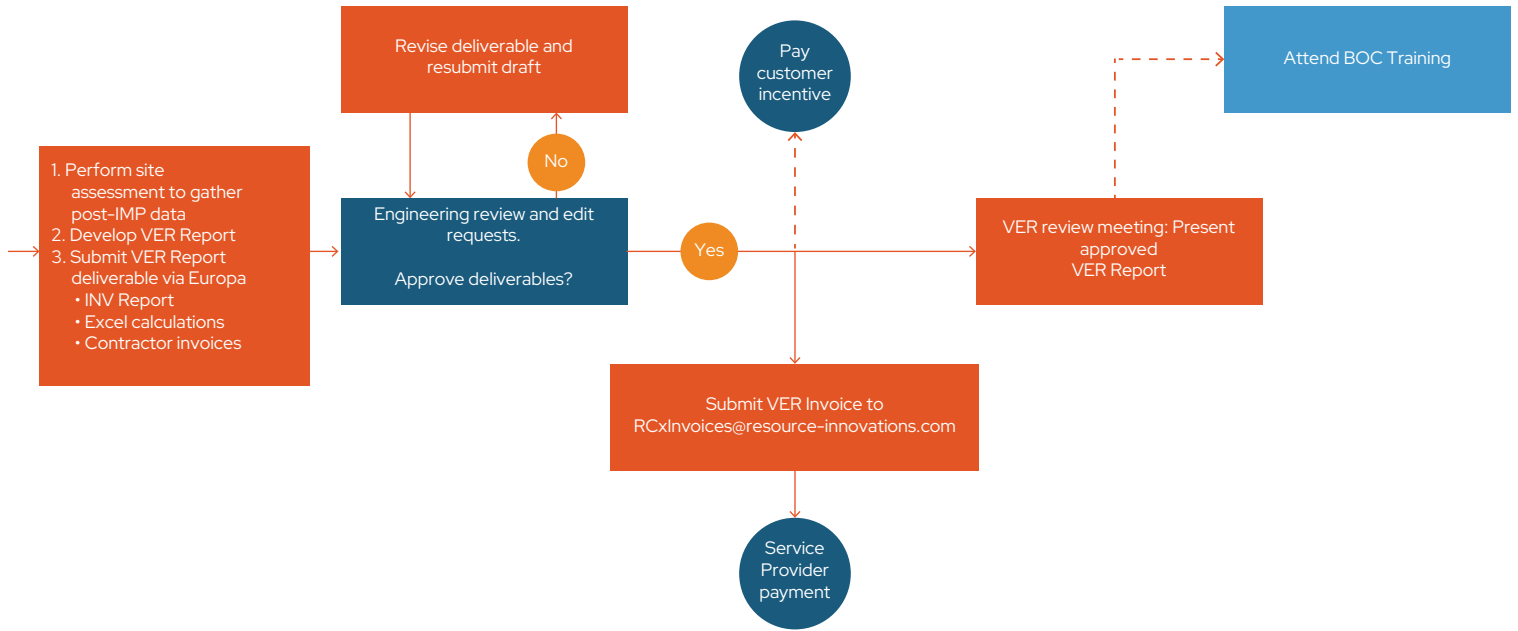
Deliverables: Completed ECM Form  
Owner: Resource Innovations, Service Provider, Customer, Contractor

#### Legend



# 10.4. Verification (VER) Phase

## Verification (VER) 6-10 Weeks



Deliverables: Verification Report  
Owner: Resource Innovations, Service Provider, Customer

### Legend

