

Energy Project Manager FAQ

BPA has supported variations of the Energy Project Manager, or EPM, measure since 2009 through the Energy Smart Industrial, or ESI, program. In 2022, BPA expanded the EPM measure to be available to utilities' qualifying end-users in both the Industrial and Commercial sectors. While guidelines have changed over time, the core intent has remained consistent. Rather than focusing incentive payments on an equipment-upgrade project or a change in equipment operation that saves energy, the EPM measure provides a payment(s) to help overcome on-site staffing resource barriers. Utilities are encouraged to review Section 10.3.1 of the [FY22-23 Implementation Manual](#), or IM, for current requirements and guidelines.

The following frequently asked questions, or FAQ, is intended to provide additional context for the EPM measure:

1. What is an Energy Project Manager?

The Energy Project Manager, or EPM, measure enables utilities to receive Energy Efficiency Incentives, or EEI, funding from BPA for their Commercial and Industrial sectors.

In an effort to help qualifying end-users meet the challenges of limited on-site staff that have a dedicated focus to support and implement energy efficiency projects, an EPM is a designated individual, typically an end-user's direct employee or contractor who helps support the development and implementation of an EPM Comprehensive Site Plan.

2. What is an EPM Comprehensive Site Plan?

The EPM Comprehensive Site Plan is a written plan that describes a holistic set of planned and potential custom, lighting, Strategic Energy Management, or SEM, projects and Unit Energy Savings, or UES, measures; as well as any other qualifying energy-savings opportunities at the site. This may be written as a single or multi-year plan, with a minimum of 200,000 kWh in eligible energy savings opportunities and must include at least one non-lighting project.

An eligible site may consist of a single building, facility, municipality, school district, or it may include multiple contiguous buildings, such as a medical complex, or educational campus. Commercial and Industrial accounts with multiple locations are eligible to participate in the EPM measure; however, each enrolled location must adhere to the criteria of an eligible site.

It is submitted along with the initial EPM enrollment and is a "living" document that will be updated when a project is completed and also when new projects are identified. BPA has created the optional EPM Comprehensive Site Plan template (available in the online [Document Library](#)) that includes the minimum required information as outlined in the IM; however, it also includes space to allow for additional details for project management purposes that an EPM, site or utility may also find useful.

3. What is the difference between Commercial EPM and Industrial EPM?

The guidelines and requirements for the EPM measures is aligned, however, the infrastructure and support will vary by sector:

- Industrial EPMs – the utility together with their assigned Energy Smart Industrial Partner, or ESIP, manage the end-user relationship, serving as the primary point of contact in support of the EPM to establish agreed upon checkpoints based upon site needs and opportunity size.
- Commercial EPMs - the utility manages the relationship with the end-user. They may also be supported by the utility-assigned BPA Customer Service Engineer, or CSE; however this is dependent upon the CSEs availability and capacity to offer support.

BPA will review the utility's initial submission of the EPM Comprehensive Site Plan for compliance with the IM requirements regardless of sector, and will review subsequent submissions with a specific focus on confirming the requested EEI disbursement aligns with eligible project details.

4. Are EPM incentives intended to replace incentives offered for custom, nonresidential lighting, SEM or UES, projects?

No. An EPM payment is an *additional payment* above and beyond other payments provided by BPA for verified energy savings, e.g. payments and savings associated with completed custom, nonresidential lighting, SEM projects, or UES measures.

As projects identified in the EPM Comprehensive Site Plan are completed, they will be reviewed and approved through the usual process for the project or measure type (e.g. UES, custom, etc.). Once they have been reviewed and approved, the projects will then be eligible for the additional EPM payment.

BPA does not attribute any savings to the EPM measure directly, as all savings are booked through the specific measure(s).

5. What discretion do BPA utilities have in defining eligible EPMs?

Typically EPMs are direct employees or contractors of the end-user or utility. BPA does not define the criteria or qualifications for an individual's eligibility. Utilities may request a qualifying EPM have technical background (certified energy manager, etc.) or hold a specific designation within a site, have sufficient availability to commit to developing the Comprehensive Site Plan and follow-through on tracking the status of projects being completed in order to prepare the documentation to submit to their utility for incentives and EPM payments. The utility may also require a contract with the end-user that defines the EPM's role and deliverables prior to offering incentives. However, BPA does not require such a contract or agreement as a prerequisite of utilities to qualify for an EEI payment.

6. Can the EPM Comprehensive Site Plan identify opportunities in both the commercial and industrial sectors?

Yes. BPA supports multi-sector EPMs with resources according to the sector with the majority of savings identified in the Comprehensive Site Plan. For example, a mixed-use site where the majority of the savings is derived from an industrial process will be driven by the Industrial Sector regardless of which sector initiated the opportunity. Individual projects identified in the EPM Comprehensive Site Plan will be reviewed and approved by the sector associated with the facility and measures to be implemented. In some cases, this may be different than the sector supporting the EPM effort.

7. Why would BPA pay more for savings achieved in coordination with EPMs than other channels?

BPA's EPM measure has been available to utilities (and their industrial end-users) since October 1, 2009, and experience has revealed by allocating co-funding to address the issue of limited staff resources focused on electrical energy efficiency efforts; facilities in general have had a more robust savings pipeline, improved communication, and shorter project lead times. This model has proven to be a cost-effective tool to meeting BPA and the utility's energy efficiency targets.

8. At what point can a utility request an EPM incentive?

Utilities can request an EPM payment whenever a project listed on the EPM Comprehensive Site Plan reaches the status of 'Ready to Invoice' within BPA's incentive processing system, which follows the technical and compliance reviews required for the various measure types (i.e. custom, lighting, UES, etc.). It is at the utilities' discretion on when and how payments are disbursed to their customer and how the payment aligns with other incentives related to the projects' completion.

A utility will submit an Updated Plan along with the associated EPM payment request as often as they'd like during the given rate period, though establishing a specific schedule (e.g., quarterly, semi-annually, etc.) may reduce the administrative burden on all stakeholders.

9. How does a utility know when the EPM has reached the payment cap on or before the end of the rate period?

Prior to BPA's Energy Efficiency Tracking System, or BEETS, utilities can use the initial and updated EPM Comprehensive Site Plan(s) to help track the project details, as well as other existing protocols¹ for tracking multiple projects. Eventually, BEETS will include an automatic report that can be used to identify eligible projects and the associated details that are included in the updated EPM Comprehensive Site Plan.

¹ Option 1 custom project completion reports and C1/C2 calculators, nonresidential lighting calculators, SEM completion reports and other calculators, UES Measure Upload Templates, etc.

10. How will an EPM know the project's verified kWh savings and when it can be reported to the utility for an incentive payment?

Each of the project's measures listed in the EPM Comprehensive Site Plan will be tracked, measured and/or calculated as defined in the IM (i.e., Option 1 custom projects have a measurement and verification, or M&V, plan that outlines how the kWh savings will be measured, etc.) and UES Measures List. Industrial EPMs may talk with their utility-assigned ESIP, whereas, Commercial EPMs may be able to talk with their utility-assigned BPA CSE.

End-users should check with their serving utility or review the utility agreement regarding when they can request the incentive payment. Generally, after the project is completed, energy savings have been measured and verified (if required), as well as collecting and submitting any required project cost documentation to their utility.

11. What type of site would be a good fit for the EPM measure?

Based on past participation, BPA has found that end-users with the following characteristics are more likely to achieve additional savings by having an assigned EPM. These characteristics are only recommendations, and should not be seen as requirements:

- Sufficient electric load to develop a multi-year pipeline of energy efficiency projects.
- Senior management buy-in of the value of energy efficiency.
- An established continuous improvement culture.

12. Who should I talk to if I have more questions about the EPM measure?

Utilities should contact their energy efficiency representative (EER) about the Commercial EPM or their utility-assigned ESIP about the Industrial EPM.

End-users should contact their utility or utility-assigned ESIP for more details.