

EE Central Update

April 25, 2012



Agenda

- **Guiding Principles**
- **Risks for Delivery**
- **What is Being Done**
 - Structure and Adding Resourcing
 - Updated Timeline for System Release
 - Contingency Planning
 - Utility Engagement Plan
- **Detailed Reporting**
- **Next Scheduled Activities**

Guiding Principles for EE Central Launch

- 1. BPA will not Release EE Central to Customers Before it is Thoroughly and Independently Tested and Meets Requirements**
- 2. Keep Customers Fully Aware and Involved**
 - Communication /Engagement Strategy – early and often
 - Demonstrations of EE Central well before release
 - Testing – Utilities and BPA staff
- 3. EE Central Needs to be Tightly Connected**
 - **...with EE Processes, e.g.** Implementation Manual and must be supported by BPA systems/processes
 - **...with the rest of BPA,** especially IT (for best practices, systems, and oversight) and Finance (payment processes, accounting, etc)
- 4. Contingency Plan if EE Central Launch is Further Delayed...**
 - Must be able to reimburse utilities regardless of internal issues
 - Provide satisfactory reporting on dollars expended and kWh savings

Risks to BPA's Ability to Successfully Deliver EE Central to the Region

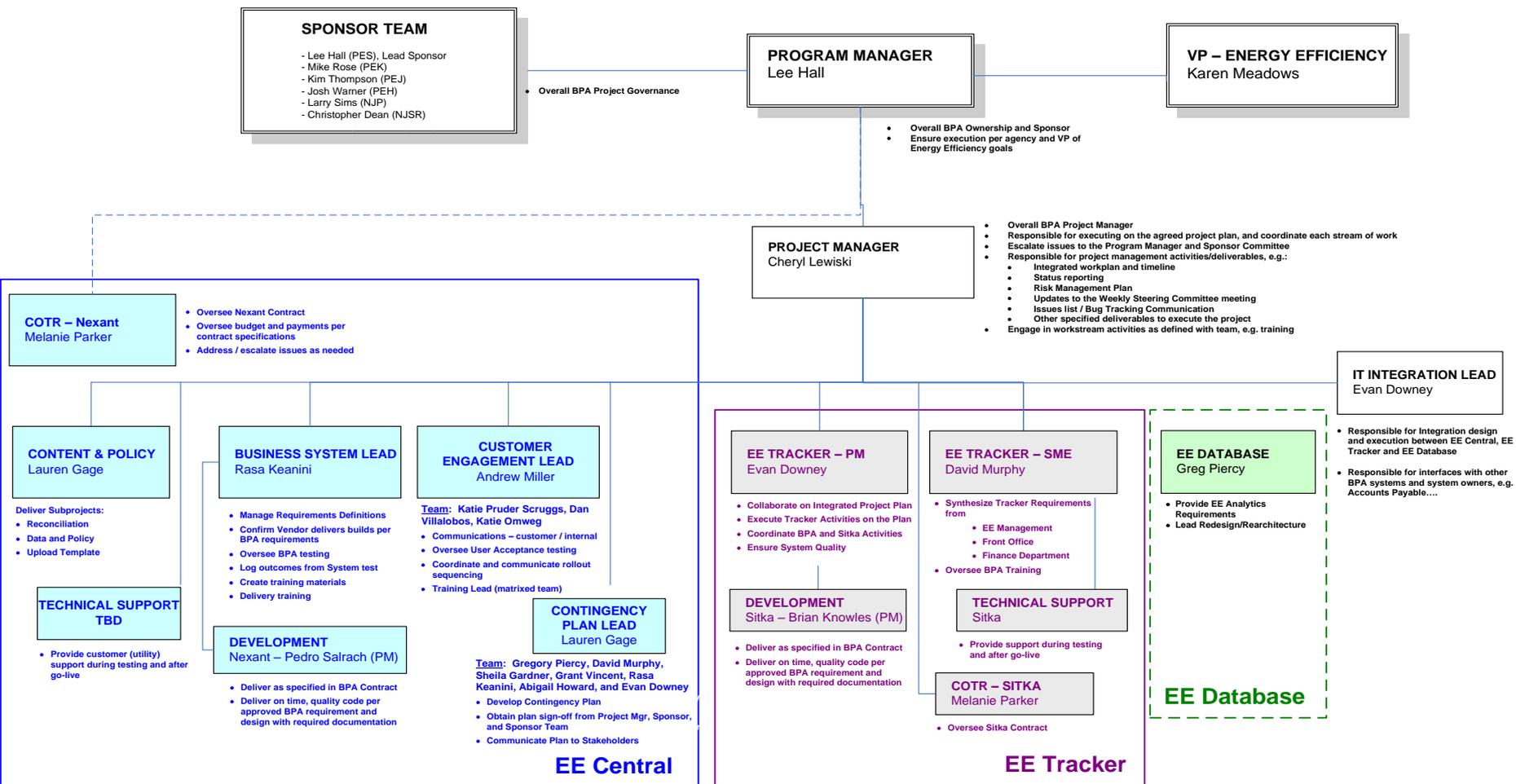
- **EE Central Integration**
 - EE Central does not operate independently; it requires supporting systems, processes, and projects to serve utilities
- **BPA Resourcing for Successful Delivery**
 - A few heroes doing everything, but insufficient resourcing for a system of this magnitude and importance to customers
 - Great additional resources within EE that are now being brought in
 - Create a single decision making framework/integrated project planning
- **Scope is Still Not Adequately Defined**
 - Working closely with the vendor to document finalized requirements
 - EE has complex and changing business rules
- **Vendor Delivery**
 - BPA is taking strong ownership of timelines across all systems
 - Continued concern with ability to deliver a quality system on-time
- **Negative Impact to Utilities' Business Practices**
 - Create a collaborative business relationship with customers
 - Interim payment process, tools and templates

Structured EE Central Project to enhance EE Systems and Processes

- **Rebuilt Project Management Approach**
 - Single Structure for all EE systems and workstreams
 - Ownership for integration with IT
 - Established a decision framework

- **New Areas Resourced:**
 - Program Manager
 - Overall Project Manager
 - Content & Policy
 - Customer Engagement
 - Contingency Planning

EE Core Systems Program Structure



The Integrated Plan is Being Updated, and Current Launch is Anticipated in FY13

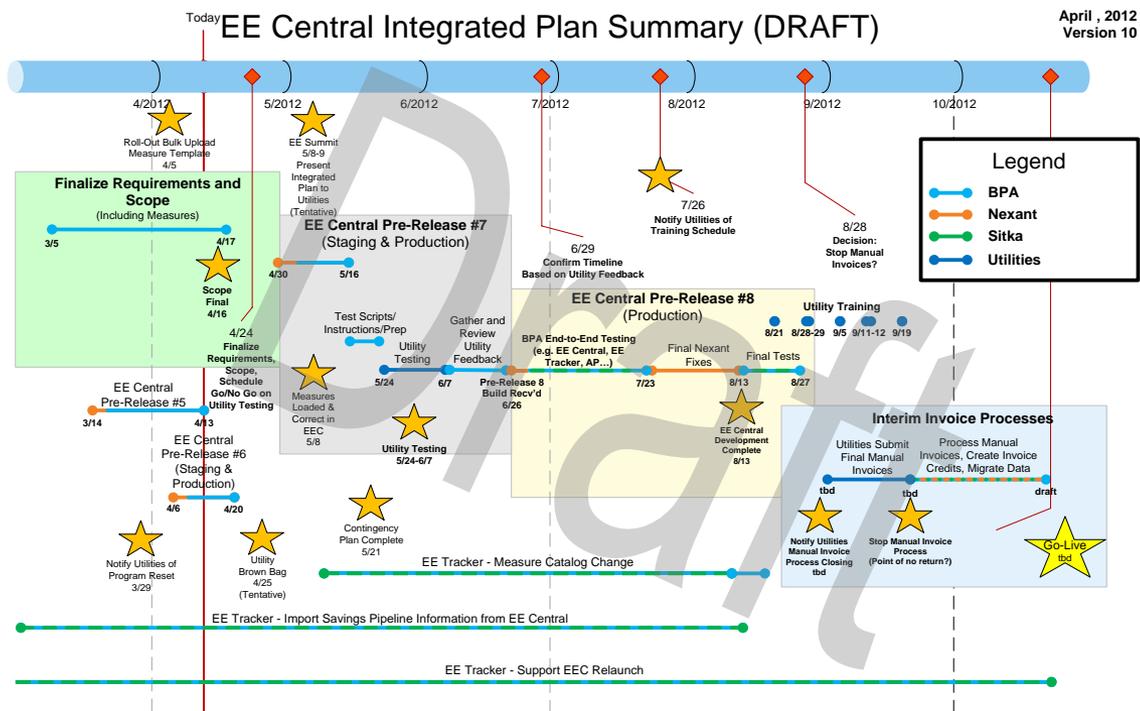
- Anticipate Early FY13 Launch
 - Current assessment: FY13 (Q1 Target)

Why?

- Get the scope right
- Development not complete
- BPA is driving the schedule
 - Vendor provides input
- Through Testing
 - Vendor testing
 - BPA testing
- Customer Engagement
 - Utility Testing and Training
 - Feedback Sessions
 - Communications

How do we track the plan?

- Stage gates at decision points
 - May Trigger Contingencies
- Clear Milestones



We Are Creating Multiple Plans to Mitigate the Impact of Delays to the EE Central Launch

Level 1	<p>How Do We Pay Utilities without EEC? How/When Do We Collect Interim Savings Data?</p>	Executing
Level 2	<p>How Do We Carry Interim Processes into FY13?</p>	Executing
Level 3	<p>What Happens if EE Central's Launch is Further Delayed?</p>	Planning
Level 3	<p>What Do We Do if EE Central is Never Delivered?</p>	Planning

Utility Engagement Plan

- **Engage Utilities Early and Often**

- **Integrated Plan Includes**
 - Regular and consistent communication with utilities
 - Testing by 15 identified utilities (User Acceptance Testing)
 - Periodic Brown Bags and Utility Feedback Sessions
 - Extensive training and development of expertise in staff
 - EERs, Engineers, and COTRs
 - Formal Utility training
 - Utility Account Administrator, webinars, updated user's manual
 - Post-Implementation Technical Support Plan

Detailed Data Collection

- **Financial Data is Being Collected and Tracked**
 - As of 4/9, EE has paid 61 utilities \$16 million through the interim invoice process
 - Quarterly accrual process in place

- **BPA is Developing a Solution to Collect Detailed Savings Data**
 - Goal: Make the process as customer-friendly as possible
 - BPA Finance is heavily involved in planning and vetting a solution
 - Current Plan:
 - Working on plan to collect detailed data in Q3/Q4 FY12
 - Handle any financial or accounting impacts internal to BPA
 - No system changes to EE Central
 - Utilities enter detailed data after EE Central Launch (as appropriate)

Next Scheduled Activities

- **Finalize Scope to Firm Up Schedule**
- **Evaluate Internal Budget Impacts in FY12 and FY13**
- **Modify Nexant Contract**
 - Change in contract delivery date
 - Creating more detailed milestones (who, what, when and how)

Questions?

- **Follow up with your Energy Efficiency Representative or;**
- **Contact Lee Hall or Andrew Miller**

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