

Next Steps for Detailed Data Collection

June 27, 2012



Presentation Outline

- Presenters
- Project Review
- Alternative Analysis
- Interim Solution
- Tentative Timeline

EE Central

- The objective of EE Central was to enable BPA's customers and regional stakeholders to:
 - Report and track energy efficiency savings
 - Measure the achievement of 6th power plan targets
 - Demonstrate compliance with regional energy efficiency policies and programs
 - Address technology obsolescence
 - Improve usability and system functionality
 - Increase automation and integration with core IT systems

Status

- A contract was created in 2010 to deliver the core EE Central functionality by October 1, 2011.
- The October 1, 2011 deadline and subsequent deadlines were missed and delivered functionality was not of acceptable quality.
- On June 6, the EE Central executive sponsor team (Karen Meadows, Greg Delwiche and Larry Buttress) requested that BPA issue a stop-work order on the EE Central project.
- Despite significant effort, the software system was not on a path to deliver a high-quality, long-term solution for BPA and its customers.
- BPA immediately began work to create an interim solution to collect detailed data with support of BPA's IT Project Management Office.
- BPA officially reset project scope on June 25, 2012.

Alternative Analysis

- To Build or To Buy...?
- Alternative Analysis Scope
 - Re-validate EE Central requirements
 - Conduct Market Research into products currently available (i.e., product demos if appropriate)
 - Utility engagement (products in use, suggestions, etc.)
 - Evaluation of Interim Solution as basis of long-term solution
 - Business case analysis
- Schedule 6-8 weeks
- Staffing for Alternative Analysis
 - Don Ulrich – Project Manager
 - Chris Ancien – Business Analyst
 - Rasa Keanini – EE - Business Lead
 - Cheryl Lewiski – Program Lead
 - Andrew Miller – Utility Outreach

Interim Summary

- When BPA took EE Central off-line in December 2011, a temporary invoicing process was developed to allow customers access to their Energy Efficiency Incentive (EEI).
- This process collects aggregated information (total savings and reimbursements for deemed, calculated and custom projects) from utilities sufficient to pay interim invoices.
- This temporary process does not provide the detailed data needed to reconcile with BPA finance requirements.
- BPA is working to create an Interim Solution to collect detailed data for planning, reporting and oversight.

Interim Solution

The Interim Solution will address two primary goals:

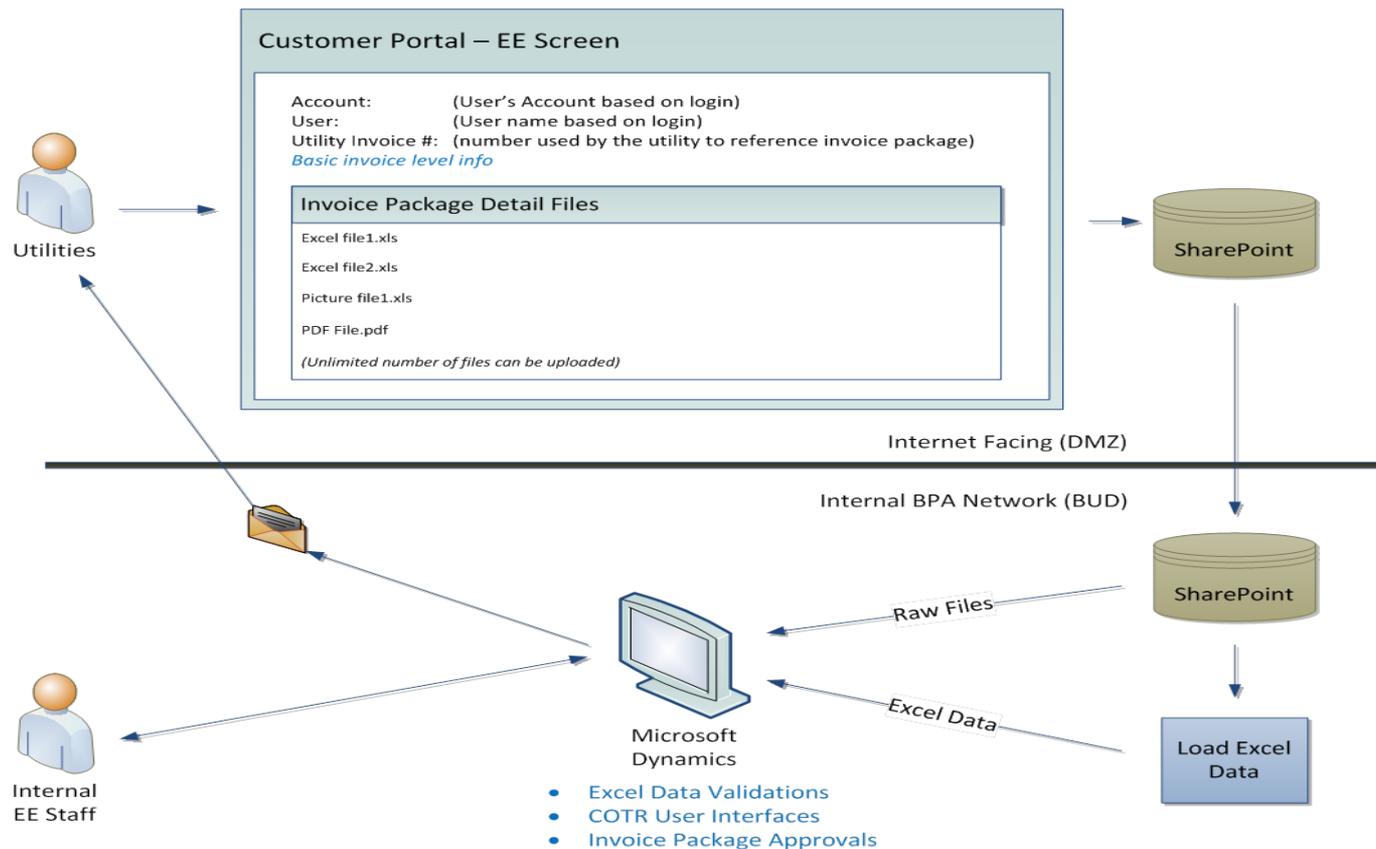
- 1) Collect and approve invoices and detailed savings data from customer utilities.
- 2) Provide a contingency option until a final system is launched.

Interim Solution Scope

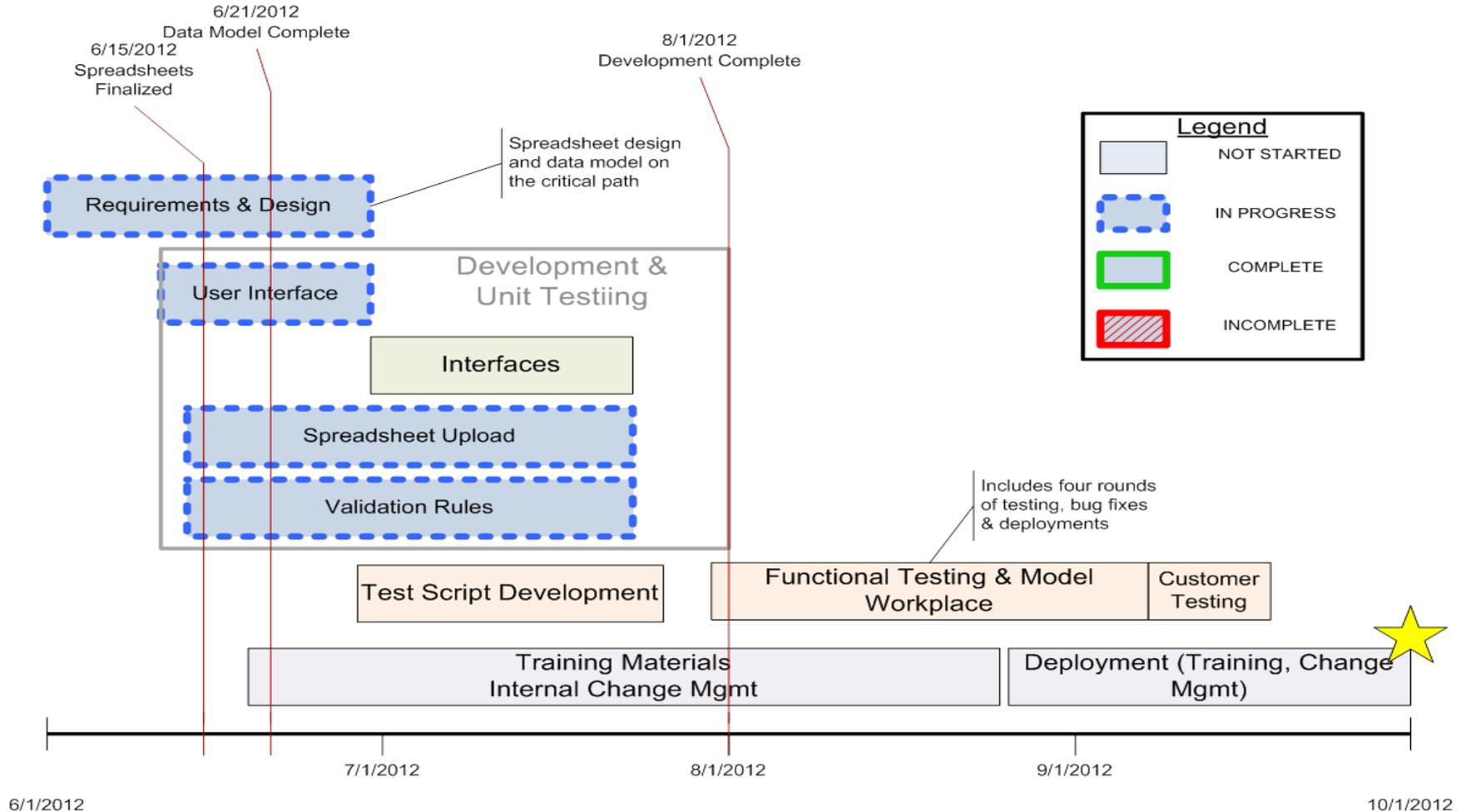
In Scope	Nice to Have	Out of Scope
<ul style="list-style-type: none">▪ Capture information for various EE savings categories▪ Pooling groups▪ Validation▪ Calculating requirements▪ COTR review and approval▪ Audit logging▪ Entry and maintenance of BPA reference data▪ Invoice request to Accounts Payable▪ Savings data to EE Tracker	<ul style="list-style-type: none">▪ Post approval invoice corrections▪ Utility user interface▪ Edit of invoice information after submission (pre-approval)▪ Budget tracking, enforcement and display of status▪ Progress payments	<ul style="list-style-type: none">▪ Customer submission and COTR approval of customer project proposals and completion reports▪ Energy Smart Grocer▪ Utility research and funding measure information

Interim Solution Interface

- Simple external utility interface using Customer Portal
- Internal EE application using Microsoft Dynamics 2011



Tentative Timeline



Questions, Comments, Concerns

- Call or email your Energy Efficiency Representative
- Lee Hall and/or Andrew Miller