

Energy Project Manager FAQ

BPA has supported a version of the Energy Project Manager, or EPM, measure since 2009. While the details 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 milestone payments to help overcome staffing resource barriers.

The EPM measure requires the development and implementation of a Comprehensive Site Plan by a site's designated energy project manager with the goal of achieving additional verified energy savings beyond what would have been achieved without the involvement of the EPM. The savings are reviewed and approved through the typical process specific to each measure type, but BPA tracks projects with EPM involvement to assist in the evaluation of their impact.

As described in the notice for section 9.2.1. in the April 2021 Implementation Manual, or IM, release, BPA will sunset the existing EPM measure and release a new EPM measure, effective April 1, 2022. The guiding principles behind the changes were to streamline the offering with reduced administrative costs, and expand its use to more end-users, including smaller and non-industrial sites. A draft of the IM language for the new EPM measure is available [here](#).

The following FAQ is intended to provide additional context for the EPM measure. The Implementation Manual that becomes effective April 1, 2022 shall take precedence over this FAQ if any descriptions are contradictory.

1. Are EPM incentives intended to replace incentives offered for custom, nonresidential lighting, Strategic Energy Management or Unitized Energy Savings, 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 UES, nonresidential lighting, Strategic Energy Management, and custom projects.

Projects identified in the Comprehensive Site Plan will be reviewed and approved through the standard approach used for the project type (e.g. UES, custom, etc.). Once they have been reviewed and approved, the projects will be eligible for the additional EPM payment.

BPA does not attribute any savings to the EPM measure directly, as all savings are booked through other measures.

2. What is an energy project manager?

For the purposes of qualifying for Energy Efficiency Incentive, or EEI, funding from BPA, an EPM is a designated individual who helps support the development and implementation of the EPM Comprehensive Site Plan. The EPM provides project-specific, on-site support. An EPM may be an end-user's direct employee or contractor.

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

BPA utilities may choose to further limit the EPM offering by targeting specific end-users, facility types, load sizes, or other factors that meet the utility's strategic goals. Utilities may also decide to require a contract with the end-user defining the EPM's role and deliverables before offering end-user incentives. BPA does not require such an agreement for the purposes of qualifying for an EEI payment.

4. What is a Comprehensive Site Plan?

The EPM Comprehensive Site Plan is a written plan that describes a holistic set of potential and planned custom, UES, lighting, and all other energy-savings opportunities and projects at the site. The Plan may be a single or multi-year plan, but must identify at least 200,000 kWh in eligible savings opportunities and include at least one non-lighting project.

An eligible site may consist of a single building, facility, municipality, or it may include multiple contiguous buildings, such as an educational or medical campus.

The Comprehensive Site Plan is a living document that will be updated as projects are completed and as new projects are identified. The Comprehensive Site Plan will be submitted at the initial EPM enrollment and then updated versions will be submitted each time an EPM payment is requested for completed projects.

The IM details the minimum requirements for a Comprehensive Site Plan, but EPMs and utilities may find that adding more detail is useful for project management purposes. BPA has created an optional template for the Comprehensive Site Plan that includes all required information and a few additional sections that have proven useful for EPM engagements in the past.

5. How will BPA support EPMs working in the industrial sector?

The Energy Smart Industrial Program will continue to support EPMs working at industrial sites. The assigned ESIP will be able to serve as the main point of contact for industrial EPMs, and will establish a meeting frequency commensurate with site needs and opportunity size.

BPA will review Comprehensive Site Plans upon initial submission by utilities for compliance with IM requirements. BPA will review Comprehensive Site Plans upon subsequent submissions for IM-requirement compliance, with a specific focus on confirming the requested EEI disbursement aligns with eligible project details.

6. How will BPA support EPMs working in the commercial sector?

Utilities will manage the relationship with EPMs working in the commercial sector, with BPA customer service engineers offering additional support to the extent that they have capacity to do so.

BPA will review Comprehensive Site Plans upon initial submission by utilities for compliance with IM requirements. BPA will review Comprehensive Site Plans upon subsequent submissions for compliance with IM requirements with a specific focus on confirming that the requested EEI disbursement aligns with eligible project details.

7. Can EPMs develop Comprehensive Site Plans that identify opportunities in both the commercial and industrial sectors?

Yes, BPA will support such multi-sector EPMs with resources according to the sector with the majority of savings identified in the Comprehensive Site Plan. The individual projects identified in the Comprehensive Site Plan will be reviewed and approved by the sector associated with the facility in which it takes place. This may be different than the sector leading the EPM effort.

8. How is the new EPM offering different than the existing EPM offering?

The new EPM offerings differs from the existing offering in several key areas:

- The new EPM measure is available to the Commercial and Industrial sectors.
- The minimum identified savings opportunity has dropped from 1M kWh to 200,000 kWh.
- BPA will no longer require to review a signed agreement between utility and end-user.
- BPA will no longer offer EPM payments before projects are completed, reviewed and approved.
- BPA will no longer require documentation of EPM salary. In its place, the new EPM measure now includes a rate period cap based on previously collected salary data.

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

BPA's experience with the EPM offering has shown that allocating funding directly to addressing the staff resourcing issue that so many end-users experience leads to 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's energy-efficiency targets.

10. At what point can a utility apply for an EPM incentive?

Utilities can request an EPM payment when a project identified in the Comprehensive Site Plan reaches the status 'Ready to Invoice' in the Bonneville Energy Efficiency Tracking System, or BEETS. This status follows the technical and compliance reviews required for the various measure types (i.e. custom, UES, etc.).

A utility may submit an updated Comprehensive Site Plan and request the associated EPM payment as many times as they'd like during a given rate period, though establishing a semi-annual or annual schedule may reduce the administrative burden on all stakeholders.

11. How will the EPM know which projects have reached the required status and what the associated verified kWh savings value is?

BEETS will include an automatic report that can be used to identify eligible projects and the associated details that should be included in the updated Comprehensive Site Plan.

12. What type of site makes for a good EPM candidate?

BPA has found that end-users with the following characteristics are more likely to achieve additional savings through engaging in the EPM process. The following characteristics are recommendations only and should not be construed as requirements:

- Sufficient electric load to develop a multiyear pipeline of energy-efficiency projects in diverse end-uses.
- Buy-in from senior management in the value of energy efficiency.
- An existing continuous improvement culture.

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

Contact your energy efficiency representative with questions or concerns.