

**This document includes the updated draft of the Energy Project Manager, or EPM, measure that BPA intends to make available effective 4/1/2022. BPA may revise this language pending stakeholder feedback, which can be submitted via your Energy Efficiency Representative.**

## **Energy Project Manager**

### **Basis for Savings**

The Energy Project Manager, or EPM, measure provides a payment to help overcome on-site staffing resource barriers. The payment is associated with development and implementation of an EPM Comprehensive Site Plan by a site's designated EPM, and which results in verified energy savings.

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 UES, nonresidential lighting, SEM and custom projects that have been completed and approved by BPA.

For this measure, the following definitions apply:

- The EPM:
  - is a designated individual who helps support development and implementation of the EPM Comprehensive Site Plan.
  - provides project-specific, on-site support.
  - may be an end-user's direct employee or contractor.
  - designation individual may be changed from one individual to another with written notice to BPA.
- 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.
  - may be a single or multi-year plan.
  - is a "living" document such that the version submitted as part of the EPM enrollment process (e.g., Initial Plan) is superseded by subsequent versions of the plan that have been updated to reflect projects that have been completed and any new projects that have been identified (e.g., Updated Plan).

### **Requirements and Specifications**

This measure is available for the Commercial and Industrial Sectors. An eligible site may consist of a single building, facility, municipality, or it may include multiple contiguous buildings (e.g., a medical or education campus).

Enrollment Application. To enroll or re-enroll a site in the EPM measure, submit to BPA:

- Site name, address and contact details;
- EPM name, title and contact details;
- EPM Comprehensive Site Plan (e.g., Initial Plan)
- Estimated EPM Comprehensive Site Plan savings potential; and
- Estimated commencement date

The EPM commencement date is the date listed on the EPM Comprehensive Site Plan and serves to establish the beginning of the EPM engagement. Projects must be completed on or after the EPM commencement date to be eligible for EPM incentives. The EPM commencement date must be April 1, 2022, or later unless the participant was actively enrolled in Energy Management: Energy Project Manager (Optional ESI Component) on March 31, 2022.

Other requirements include:

- Projects included in the EPM Comprehensive Site Plan cannot use hours worked by the individual identified as the EPM in their project costs.
- Each completed project is eligible for only one EPM payment.
- After the initial EPM enrollment is approved by BPA, the customers may invoice BPA multiple times in a rate period as long as all post-conditions are met with each invoice.

**Preconditions**

1. The EPM must develop an EPM Comprehensive Site Plan.
2. The EPM Comprehensive Site Plan (Initial Plan) must be reviewed and approved by BPA.
3. The EPM Comprehensive Site Plan (Initial Plan) must include the following at a minimum:
  - a. EPM Name, Title, and end user site affiliation
  - b. Site name
  - c. EPM commencement date
  - d. Project names and details for all potential and planned custom, UES, lighting and other energy-savings opportunities, including:
    - Project description
    - Estimated energy savings with a brief description of the approach used to estimate the value
    - Estimated completion date
    - Estimated cost
  - e. The sum of identified energy-savings must exceed 200,000 kWh.
  - f. At least one opportunity must be categorized in an end-use other than lighting.

**Post-Conditions**

1. The EPM must oversee implementation of energy efficiency project(s) defined in the EPM Comprehensive Site Plan.
2. The EPM Comprehensive Site Plan (Updated Plan) must be reviewed and approved by BPA.
3. The EPM must complete an EPM Comprehensive Site Plan (Updated Plan) that includes all the following, at minimum:
  - a. EPM name, title, and end user site affiliation
  - b. Site name
  - c. EPM commencement date
  - d. Updated plan date
  - e. New projects identified since the Initial Plan or previous Updated Plan, in addition to existing planned project names and details, including:
    - Project description
    - Estimated energy savings
    - Estimated completion date
    - Estimated cost
  - f. Completed project names and details for which an EPM payment is being requested:
    - Project description

- Verified energy savings
  - Site ID
  - BPA project approval date
- g. Completed project names and details for which an EPM payment was previously paid:
- Project description
  - Verified energy savings
  - Site ID
  - BPA project approval date

**Documentation Requirements**

DOCUMENTATION DESCRIPTION	RETENTION/SUBMITTAL LOCATIONS	
	BPA ENERGY EFFICIENCY TRACKING SYSTEM	CUSTOMER FILE
Enrollment Application	X	
EPM Comprehensive Site Plan (Initial Plan)	X	X
EPM Comprehensive Site Plan (Updated Plan)	X	X

**Payment**

MEASURE CATEGORY	PAYMENT
Energy Project Manager	Lesser or \$0.025 per kWh of verified energy savings or \$150,000 per site, per rate period

**Additional Information**

- There is an optional template for the EPM Comprehensive Site Plan.
- The use of this template is not required. For customers enrolled in ESI, ESI staff are available to support customers in identifying prospective EPMs in the Industrial sector and to support enrolled EPMs operating in the Industrial sector in developing EPM Comprehensive Site Plan. ESI staff are not available to support EPMs operating in the Commercial sector.