

ENERGY EFFICIENCY

Direct Funding Demonstration Application

This application is for a demonstration funding request and funds are not guaranteed. To be eligible, utilities must demonstrate that its Energy Efficiency Incentive (EEI) allocation for the 2022-2023 rate period will be fully exhausted by September 30, 2023. Utilities may combine EEI and demonstration funding; however, demonstration funding may be withheld or delivered as a partial payment to ensure that EEI is exhausted.

A. APPLICANT INFORMATION

<input type="text"/>		<input type="text"/>	
Utility Name		Federal TIN	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Utility Contact	Phone	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Technical/Other Contact	Phone	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Agreement Signatory	Phone	Email	

Choose one of the following:

- Utility **has fully utilized** its fiscal year 2022-2023 EEI.
- Utility **has not fully allocated**, but **anticipates fully utilizing** its fiscal year 2022-2023 EEI by September 30, 2023.
- Utility **has not fully allocated** its 2022-2023 EEI, **but will fully utilize it by applying** its EEI funds to this project.

This funding opportunity allows for payment flexibility. Indicate if you would like to request an initial financial assistance payment prior to exhausting EEI funding. If requesting initial financial assistance funding, identify the percentage of funding requested. Initial payments are intended to aid projects that require upfront capital to complete the project. Final payments will be in accordance with final savings and EEI allocation status.

- I request an initial financial assistance payment. Initial payment represents _____ .% of total funding request. *(Direct Funding Request amount is outlined in Table B of Section D.)*



ENERGY EFFICIENCY

Direct Funding Demonstration Application

Energy Efficiency Project is the installation or implementation at a stationary source of one or more of the BPA approved conservation measures and/or custom projects in accordance with BPA M&V protocols that is not otherwise required by law or regulation and that results in energy savings at a facility located in BPA's service territory. For the purposes of this application, a project may represent multiple customers or sites when like-UES measures are bundled together.

B. UTILITY PROJECT PROPOSAL

Project Name:

Project Description:

Enter a project description that includes, but is not limited to the project goals, objectives, facility, and end users served. Describe the existing (baseline) and the proposed conditions.

Facility/End-User Name:

Facility (Building) Name and Address:

Sector (check one):

Residential Commercial Industrial Agriculture Distribution

Is this project (check all that apply):

UES BPA Calculated Saving (BPA Q)(I) Custom

Will all measures supported by the project be completed by June 30, 2023? Yes No

Will all measures supported by the project be invoiced by September 30, 2023? Yes No



ENERGY EFFICIENCY

Direct Funding Demonstration Application

Section C. Energy Savings Summary, must be supported by Attachment A (Project Worksheet)

-or-

Provide your own measure-level pro-forma in support of the project proposal.

BPA approved-calculators and/or C1 forms are acceptable.

C. ENERGY SAVINGS SUMMARY

Enter estimated site kWh savings either from Attachment A or other pro-forma support documentation.

D. PROJECT BUDGET

Instructions for Table A:

- Enter the 'Total Project Costs', using Attachment A or other pro-forma documentation.
- Calculate the 'Project Cost Cap' by multiplying the 'Total Project Costs' by 70%.

Instructions for Table B:

- Enter the amount of 'Direct Funding Requested from BPA', using Attachment A or other pro-forma documentation.
- If applicable, enter the amount of 'Self-Funding' that your utility is willing to contribute towards this project.
- If applicable, enter the amount of attributable 'EEI-Funding.'
- If applicable, enter the fair market value of that will come from other sources including in kind services, materials, other incentives, grants or awards outside of BPA.

List source of funds below:

- Calculate 'Total Funding Amount' by summing 'Direct Funding Requested from BPA', 'Self-Funding', 'EEI-Funding' and 'Other Contributions.'

Instructions for Table C:

- Complete Table C if 'Project Cost Cap' from Table A is less than 'Total Funding Amount' from Table B.
- Enter 'Direct Funding Requested from BPA' in Table B.
- Calculate 'Difference' by subtracting 'Project Cost Cap' from 'Total Funding Amount.'
- Calculate 'Adjusted Funding Request' by subtracting 'Difference' from 'Direct Funding Requested from BPA.'

TABLE A: Total Project Costs

Total Project Costs \$ _____

Multiplier **70%**

Project Cost Cap \$ _____

'Total Project Costs' represent the summation of the labor and materials costs for the proposed energy-efficient project.

TABLE B: Funding Table

Direct Funding Requested from BPA

+ Self-Funding

+ EEI-Funding

+ Other Funding

Total Funding Amount

'Direct Funding Requested from BPA', represents the incremental grant funding requested, whereas, 'Total Funding Amount' takes into account other funding sources.

TABLE C: Incentive Adjustment

Direct Funding Requested from BPA:

Difference

Adjusted Funding Request:



ENERGY EFFICIENCY

Direct Funding Demonstration Application

E. NON-ENERGY SAVINGS BENEFITS

Identify Benefits (Check all that apply):

- Low income or Disadvantaged communities
- Public Facility
- Minority or women owned business
- Health, Safety or comfort
- Economic

Other: Please explain any other non-energy savings benefits.

Describe impact: Please describe quantitative and qualitative impacts for each box checked.



ENERGY EFFICIENCY

Direct Funding Demonstration Application

F. APPLICANT CERTIFICATION AND SIGNATURE

My signature below indicates the following:

- I understand that fuel switching is not permissible under any BPA incentives or programs.
- I affirm that this project has not already been reported to BPA using EEI or Self-funding.
- All conservation measures installed meet the requirements of BPA's conservation standards found at <https://www.bpa.gov/-/media/Aep/customers-and-contractors/bfai-21-1-1-full-text-parts-1-8-and-appendices.pdf>.
- I understand that BPA M&V protocols will be followed.
- I will ensure that BPA staff is provided access to the project site.
- I will provide additional project documentation upon request.
- I understand that changes to the proposal after BPA's acceptance may reduce the funding received.
- I understand that a separate funding agreement must be signed before receiving any funding for this project.
- The project installation associated with this application will be completed before June 30, 2023, and invoiced before September 30, 2023.
- All the information in this application is true and accurate to the best of my knowledge.
- I am authorized to sign on behalf of the utility.

Applicant Printed Name

Applicant Title

Applicant Signature

Date mm/dd/yyyy



ENERGY EFFICIENCY

Direct Funding Demonstration Application

ATTACHMENT A: PROJECT WORKSHEET

MEASURE DETAILS					FINANCIAL DETAILS					SAVINGS DETAILS	
A	B	C	D	E	F	G	H	I	J	K	L
Measure Description	Ref # <if known>	Total Qty	Proposed Incentive kWh Rate	Qty Unit	Direct Funding Requested	Other Amount	EEl Funding Amount	Self Funding Amount	Total Project Costs	Est. kWh Savings per Qty Unit	Total kWh Site Savings
VRF upgrade (UES example)	CHVHI20801	115	\$750	per ton	\$86,250	\$0	\$0	\$28,750	\$250,000	4222	458,530
Process Improvement (custom example)	CHVHI2080	500,000	\$0.25	per kWh	\$125,000	\$0	\$0	\$0	\$1,000,000	1	500,000

INSTRUCTIONS:

- | | |
|--|--|
| <p>A Enter a brief measure description.</p> <p>B Enter measure specific 'Ref #'s'. Refer to the lists at:
https://www.bpa.gov/energy_and_services/efficiency/interim_solution_2_0_files.</p> <p>C Enter the quantity of unit for the particular measure type.</p> <p>D Enter a proposed incentive rate that may vary from the Implementation Manual (IM) incentive cap; lower proposed rates are more competitive.</p> <p>E Enter the unit of measurement that correlates to measure type; examples include 'per kWh', 'per unit', 'per horsepower', 'per ton' or 'per sqft.'</p> <p>F Enter the "Direct Funding Requested" by multiplying 'Total Qty' (C) by 'Proposed Incentive kWh Rate' (D).</p> | <p>G Enter any funds, including the fair market value of in kind services or materials, received from other sources (non BPA).</p> <p>H Enter the dollar value of any contributing funds from EEI funding.</p> <p>I Enter the dollar value of any contributing funds from self funding.</p> <p>J Enter the Total Project Costs as the sum of the facilities' costs (labor and materials) to implement the project.</p> <p>K Enter the estimated amount of kWh savings specific to the 'Ref #' (B); that correlates with the unit for the measure 'Qty Unit' (E).</p> <p>L Enter the Total kWh Site Savings by multiplying the 'Total Qty' (C) by 'Estimated kWh Savings per Qty Unit' (J).</p> |
|--|--|

