

Planning Update

October 24, 2017
Oregon Roundtable

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EE Systems: Customer Roadshow Summary

Overview

This past spring, BPA embarked on a “Systems Roadshow”, interviewing 20+ public utility customers focused on three primary objectives:

1. Gather feedback on the processes used to gather conservation data from end-use customers, translate it, and submit it to BPA for invoicing.
2. Gather an understanding of the various tracking and reporting system, tools, and processes used in the region to implement conservation programs.
3. Gather an understanding of how BPA customers have configured their system, tools, and processes to work closely to how BPA processes invoices today.

General Conclusions

1. If BPA pursues a new system, it should ***concentrate on a subset of limited core functions that focus on streamlining the exchange of data.***
 - Customers do not want BPA to continue to invest a large amount of resources in the past vision to build a robust end-to-end “system.”
2. In general, the largest ask of all our customers is ***more access to reporting data*** in a centralized location.
 - One way data feeds create reconciliation and reporting/data analytics challenges
3. Most of the region is still ***relying heavily on manual data gathering and input.***
 - Online web-fillable forms and cloud data solutions are not yet being employed

More Details?

- The full document is available for download at bpa.gov (<https://www.bpa.gov/EE/NewsEvents/ee-announcements/Documents/2017-EE-Systems-Roadshow-Announcement.pdf>)
- Additional questions can be directed to your EER and the BPA EE Systems Lead - Adam Morse (armorse@bpa.gov)

Focus 2028 Background

BPA began a public process called Focus 2028 in the fall of 2015. Energy efficiency was one of several topics in that process to help ensure BPA was competitive. Energy Efficiency's portion of that process concluded in October 2016.

Initiative Summary

Ongoing Projects		As of: October 2017	
Focus 2028 Commitments		Efficiency Forward Goals	
	Energy Efficiency Value Proposition		Compliance and Service Reliability
	Reassess BPA's Determination of its energy efficiency Goal		System Stabilization
	Increase BPA's Self-Funding		Customer Service Protocol: COMPLETE
	Increase Rate Period Rollover		Rate Period Implementation Manual: COMPLETE
	Bilateral Transfer Enhancement: COMPLETE		Small/Rural/Residential Customer Assistance



Reassess BPA's Determination of its energy efficiency goal

Goal:

Explore and evaluate alternatives to how BPA determines its energy efficiency goal.

Process:

BPA is updating its resource program process, and will work with the Power Planning Council, customers and stakeholders on how this data should be used as an input to our EE goal.

Status:

Project underway following methodology workshop. Draft supply curves expected in early winter. Resource Program is on track with an upcoming public meeting on November 9th.



Increasing BPA's Self-Funding

Goal:

Work to achieve Public Power's energy efficiency goal with less reliance funds collected in BPA's rates.

Process:

As of the 2018-19 rate period, BPA will collect only 70% of the resources needed to achieve the programmatic portion of our energy efficiency goal.

Status:

FY18-19 EEI budgets reflecting this funding approach have been released. Guidance document updated. Communicating reporting requirements, preparing to track and report progress toward 30% self-funding goal.



Increasing Rate Period Rollover

Goal:

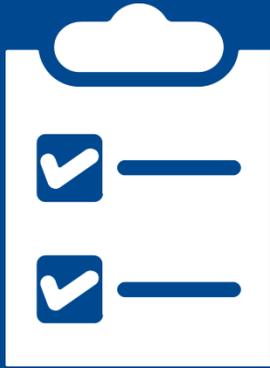
Specifically targeted to smaller customers that have expressed interest in more flexibility with funding large projects to have more adaptability within the Energy Efficiency Incentive funding program.

Process:

BPA increased the ability to rollover program funds from 5% to 10% of a customer's rate period budget or \$50,000, whichever is greater.

Status: COMPLETE

Completing roll over into FY18 rate period.
Successfully minimized unspent funds.



Evaluate EE's Approach to Compliance and Reliability

Goal:

Assess and affirm compliance practices required by financial rules and regulations and energy savings reliability and identify the most efficient, effective means for meeting these requirements.

Process:

EE will consider making changes to its current approach/practices concerning financial compliance and savings reliability based on requirements and best industry practices.

Status:

- Review of legal obligations complete.
- Review of best practices complete
- Proposal under review by management



Assess Rate Period Implementation Manual

Goal:

Assess the costs and benefits of publishing the IM on a two year cadence.

Process:

Complete the assessment to determine if a rate period IM is feasible for the EE program and the consequences to portfolio cost and savings accuracy and reporting and decide if best to move to that frequency.

Status: COMPLETE

Final policy on a 2 year IM was completed and approved. BP-18 Implementation Manual has been released!



Small/Rural/Residential Customer Assistance

Goal:

Help ease energy efficiency programs implementation burdens for small, rural, and/or residential customers.

Process:

Consult with customers to identify and validate potential improvements to BPA programs and process. Prioritize, plan, and implement changes.

Status:

The work team has developed a set of recommendations and proposed actions based on input from customers.

Currently considering next steps and actions.

Other Happenings

- Evaluation projects
- Momentum savings projects
- Ongoing system maintenance