BPA Energy Efficiency

Utility Brown Bag Session

November 18, 2008, Noon – 1 pm

Planning, Tracking, & Reporting (PTR) System – Part I

Presenters: Grant Vincent (BPA Energy Efficiency) and Nora Miller (Synergy Consulting, Inc.)
Facilitator: Melissa Podeszwa (BPA Energy Efficiency)

Agenda

1. **Reminders / Introductions / Session Overview (5 min)**

2. **FY 2007 and FY 2008 Improvements to PTR System (20 min)**
   - Bulk upload to shopping carts for deemed measures.
   - Custom Project features (e.g. uploadable credit calculator).
   - Pre-reporting tools to identify missing and duplicate measures.
   - EER Reports.

3. **Priorities for FY 2009 (15 min)**
   - Prepare the PTR System for the next rate period (FY 2010-11).
   - Enhance/expand reporting features.
   - Train new technical support person (to back-up & eventually replace Nora).
   - Improve on-line user support (FAQs, tutorials, Wiki?, etc.).
   - TBD (will be based on responses to next annual user survey).

4. **Future PTR Brown Bag Sessions (15 min)**
   - How to make these sessions most useful?
   - How often?
   - Future topics?

5. **Closing (5 min)**

Summary of FY 2007 Improvements to PTR System

Deemed Measures

- Upload to shopping cart from Excel template (multiple measures / bulk reporting)
- Display "Measure Expired Date" for certain measures (clothes washers & dishwashers)

Lighting Projects (lighting calculators)

- Verification of correct sector (commercial, industrial, or agricultural) prior to uploading calculator
- Upload to shopping cart from Excel template (for uploading multiple lighting projects at once)

Custom Projects (proposals and/or completion reports)

- Separate date fields in templates for measure installation and M&V completion
- Email reminders to utility when planned completion dates have passed
- Utilities can update planned completion dates (measure installation and/or M&V completion)
- Utilities can request to change funding source or cancel a project
- Audit Tracking Number field added to templates (primarily for BPA-funded TSP audits)

Shopping Carts

- Combine carts
- Change funding source for cart measures - - move measure(s) to other cart(s)
- Flag already-reported measures (in green)
- Download to Excel file (all data to be reported for each measure/project in cart)

Biannual/Annual Reports

- Include/display corrections issued by COTR for measures in previously-accepted reports
- Automatically include "missed" measures from previous reporting periods (up to 12 months)
- COTRs can add missed measures from previous reporting periods (if more than 12 months)
- Flag missed measures included from previous reporting periods (in red)
- Display Certified Technician (CT) numbers for PTCS measures
- Download to Excel file (all reported data for each measure/project in report)

Funding Sources

- High Water Mark (HWM) Utility Funds category added
- Multi-Sector Offer (MSO) sub-funding category added

Third-Party Program Support (e.g. Energy Smart Grocer)

- Send cart to utility (from third party)
- Accept or return cart from/to third party (utility determination)
- View sent cart history

Summary of FY 2008 Improvements to PTR System

Deemed Measures

- Non-cost-effective measures with $0 BPA credit/reimbursement were moved into separate "Non-Reportable" sub-categories (no longer mixed in with cost-effective measures).
- Measures with increased BPA incentives were made available in PTR system in a more timely manner - - usually within one day of BPA's announcements (including PTCS measures, lighting fixtures, freezers, refrigerator/freezer recycling, and low income prime windows).
- FY 2009 data set available one-month before start of fiscal year (rather than after start of year).

Custom Projects (proposals and/or completion reports)

- Single proposal template design for all projects (no more navigating through sectors & categories).
- Credit calculator now programmed to select correct BPA incentive rate ($/kWh).
- Credit calculator data for individual measures can be uploaded to proposals & completion reports.
- All user selections/inputs in credit calculator are displayed in proposals & completion reports.
- Accepted proposals display date of acceptance and assigned reference number.
- Completion report displays dates the proposal was submitted and accepted.
- Measure information from proposal displayed in completion report for comparison purposes.
- Added a direct link from completion report to proposal.
- Added "Delete Draft Proposals" feature.

Third Party Program Support

- New reference number established for third party (Energy Smart Grocer) lighting projects.
- Third Party contract numbers can now be assigned to custom projects.
- Green Motors Initiative (motor rewind) measures added.
- Estimated energy savings for NEEA contributions are now hardwired (kWh per $ contributed) and trued-up later with COTR corrections feature (based on subsequent NEEA program evaluations).

Biannual/Annual Reports

- Pre-reporting tools (data queries) added for identifying missing and duplicate measures.
- Report IDs displayed at top of reports and in email notifications.
- Column for shopping cart name added to downloadable Excel file.

Funding Sources

- Irrigation Rate Mitigation Product (IRMP) category added.
- Non-Reportable category added.

EER Reports

- Budget and Status Report
- Reported Expenditures ($) and Savings (aMW)
- Custom Projects in Pipeline (by Sector)
- Custom Projects in Pipeline (by Project Status)

Renewables Reporting

- Separate annual reporting process established for renewables activities.

Planning, Tracking, and Reporting System
Version 2.0

shopping cart | your account | help center

Reporting Period:
Fiscal Year 2008: October 1, 2007 to September 30, 2008

Your Account

Hello.

Account Information

Account Maintenance - *Create or modify accounts for your utility.*

AE/EER Account Maintenance - *Create or modify account Executive(AE) and EER accounts for your utility.*

Change Password - *Change your account password.*

Change Fiscal Year - *Change the fiscal year to another fiscal year.*

Log-In - *Log-in to another account.*

Utility Determination - *Utility determination.*

Custom Projects

Submit Proposals - *Create, save, edit and submit project proposals.*

View Submitted Proposals - *View proposals already submitted/accepted.*

Revise/Cancel Proposals - *Revise planned completion dates or cancel project.*

Submit Completion Reports - *Create, save, edit and submit project completion reports.*

View Submitted Completion Reports - *View completion reports already submitted/accepted.*

Revise Funding Source - *Revise funding source for project proposals or completion reports.*

Delete Draft Proposals - *Delete draft proposals or saved templates.*

Shopping Carts

New Shopping Cart - *Create new shopping cart.*

Combine Shopping Carts - *Create a new shopping cart by combining or aggregating other carts.*

My Shopping Carts - *View your shopping carts.*

Modify Cart Description - *Modify shopping cart description.*

Change Funding Source for Shopping Cart Measures - *Change funding source for measure(s).*

Sent Cart History - *View sent cart history.*

Move Cart Measures - *Move cart measures to MSO sub-funding source.*

View RCP Shopping Cart - *View data entry progress for RCP report.*

Upload Bulk Data to Shopping Carts

Upload Deemed Measures to Shopping Cart - *Upload deemed measures to shopping cart*.

Upload Grocery Deemed Measures to Shopping Cart - *Upload grocery deemed measures to shopping cart*.

Upload Calculated Measures to Shopping Cart - *Upload calculated measures to shopping cart*.

Upload Non Reportable Measures to Shopping Cart - *Upload non reportable measures to shopping cart*.

Upload RCP Shopping Cart - *Upload data to RCP shopping cart*.

Orders/Reports

My Orders for CAA - *View orders/reports for CAA submitted*.

My Orders for CRC - *View orders/reports for CRC submitted*.

Change Funding Source for Reported Measures - *Change Funding Source for submitted CRC reports*.

Data Query - *Data query*.

EER Reports - *Detailed utility-specific status reports for CAPs*.

File Report - *File your reports to BPA* .

Multi-Year RCP Report - *View multi-year RCP report.*

View Submitted RCP Report - *View submitted regional conservation progress report.*

Goals - *Set up your fiscal year goals.*

Progress Report - *View your progress towards your fiscal year goals.*

Links

Sector Content Links - *Create, modify, or delete sector content links.*

Sector Related Programs - *Create, modify, or delete sector related programs.*

Log Files

Admin Log File - *View system administration log file.*

Web Application Log File - *View web application log file.*

Search Log File - *View search log file.*

Visitor History - *View history of user visits.*

September 29, 2008

Summary of Changes in PTR System for Custom Projects

Item/Feature	Before Sept 29, 2008	Effective Sept. 29, 2008
1. Steps required to create a new project proposal.	Navigate through sectors and measure categories/subcategories on the PTR site to select appropriate proposal template.	Click on "Submit Proposals" link in "Your Account" and choose the sector (single template for all new project proposals)
2. Avoided cost assumptions in the credit and cost-effectiveness calculator.	Avoided cost assumptions based on previous versions of NW Power and Conservation Council's Power Plan	Avoided cost assumptions based on the Council's 5th Power Plan, resulting in higher benefit/ cost ratios[1].
3. Numeric results from the credit calculator for individual measures.	Manually entered (or copied and pasted one-at-a-time) into PTR custom project templates.	Uploaded to PTR templates as non-editable data. Mistakes can be corrected in the calculator and results can be uploaded to templates again (over-writing previously uploaded data).
4. BPA reimbursement rate ($/kWh).	Selected by the user in the proposal template. Displayed but not editable in completion reports.	Determined by user selections in Credit Calculator and uploaded with other measure data. Can be corrected in completion reports.
5. Assignment of project / measure categories and subcategories.	Based on the specific proposal template selected by the user in the PTR site. Not editable in completion reports.	Selected in the Credit Calculator. Can be corrected in completion reports.
6. Individual measure names.	Entered in the proposal template. Not editable in completion report.	Entered in the Credit Calculator and uploaded to templates. Can be edited when uploading completion report measure data.
7. Other user selections made in the credit calculator (e.g. sector and measure profile).	Not entered or displayed in PTR custom project templates.	Uploaded from calculator and displayed in PTR custom project proposals and completion reports.
8. Additional utility and project-level information related to proposals.	Not available in previous proposals or completion reports.	Utility-specific industrial reimbursement rate, third-party provider number, proposal acceptance date, project reference number (for accepted proposals).

[1] This increase occurs for three reasons. First, this version uses the Northwest Power and Conservation Council's 5th Power Plan medium forecast for future electricity prices to compute the value of energy savings and the reduction in cost due to deferral of distribution and transmission system expansion. The prior version used an older and slightly lower price forecast. Second, the calculation of the present value benefits of energy savings reflects the risk mitigation benefits provided by conservation. This adds five dollars per megawatt hour to the value of savings from non-lost opportunity resources and ten dollars per megawatt hour to the value of savings from lost-opportunity resources. Finally, this version reflects revisions to the Council's ProCost Model that corrected minor errors in the way benefits and costs were calculated.

9. Individual measure data from the proposal automatically displayed in the completion report.	Sector, category, subcategory, measure name, and reimbursement rate (non-editable).	Same as before, plus calculator version number, calculator report file name, calculation date, measure load profile, cost cap (%), and project type (new or retrofit).
10. Navigation required to view the project proposal while viewing the project completion report.	Click on "Your Account" icon , click on link to "View Submitted Project Proposals", and search for project title on drop-down menu.	Click on "View Entire Proposal" link provided in the individual measure section of the completion report to open the proposal in a separate browser window.
11. Designation of reference numbers assigned to new project proposals.	Based on user-selected sector and measure category, similar to deemed measure reference numbers.	Custom project (CP) reference numbers designated by sector: ACP, CCP, ICP, RCP, & OCP.
12. Credit calculator inputs.	User entered measure life.	Measure life is determined by the measure selected.
13. Results displayed in credit calculator.	Included display of project life cycle cost.	Project life cycle cost no longer displayed. Present value non-energy benefits added.
14. Additional selections and inputs required in Credit Calculator	Not applicable	• Fiscal year in which the project was or is expected to be approved • New construction/major remodel vs Existing/retrofit • Measure category and subcategory • Descriptive measure name • (For some projects) Approved before or after Feb 2007 • (Optional) Non-Energy Benefits
15. Consistency of measure categories & subcategories across project types	Inconsistencies between single-measure project templates and multiple-measure project templates.	Normalized, more consistent, and less programming required to update/maintain in the PTR system.
16. Credit Calculator version history & planned improvements/fixes	Version history on hidden tab, access limited to programmers and technical support	Version history and list of planned improvements/fixes maintained as separate, public document. Can be corrected/updated without issuing a revised calculator.
17. Summary of BPA incentive changes during current rate period (reimbursement rates and cost caps)	Not available in a single document.	Summary included as a separate, public tab in the Credit Calculator. Allows user to easily verify that the calculator is selecting the correct incentive rate and cost cap for their project.

Bonneville Power Administration

Custom Project Proposal

Serving Utility:	BPA Utility Create New Project
Industrial Reimbursement Rate :	Early Start - FY 2008 Proposals ($/kWh) : 0.12 FY 2009 Retrofit Proposals ($/kWh) : 0.17

* = Required information

I. Project Description

*Project Title:	New Agricultural Project Change Project Title
Third Party Provider Number:	Select Third Party Number
*Sector:	Agriculture/Irrigation
Submitted Date:	10/21/2008
*Brief Description of the project:	
*Planned Project Start Date:	
*Planned Date by when Measure(s) will be Installed & Operating:	
*Planned Date by when Measurement & Verification (M&V) will be Completed:	
*Funding Source:	CAA
*Planned Sub-Funding Source (For CAA Only):	select Sub-Funding Source

II.Utility's Customer Information

*Name:	
*Address:	
Street:	
City:	
State:	Select State
Zip:	
*Building:	
*Account Number:	
Audit Tracking Number	
Agricultural Type (If Applicable):	-- Select Type --

III.Contact Information

Utility:	BPA Utility	**Customer:**		**Other Contact**	
Name:		Name:		Name:	
Phone:	(xxx-xxx-xxxx)	Phone:	(xxx-xxx-xxxx)	Phone:	(xxx-xxx-xxxx)
Email:	(name@mail.com)	Email:	(name@mail.com)	Email:	(name@mail.com)
				Role/Title:	

IV.Individual Measure Description

If your copy of the Credit Calculator is older than the version shown at the right, click here to save a new copy.In the File Download popup, click SAVE -- NOT OPEN -- to save it to your computer. Then open it in Excel to calculate measure values.	**Current Version of the Calculator is: 3.01**	**Calculator Last Updated on: 10/01/2008** Revision History

Upload this measure's Report File to fill in the following values.

Note: After uploading this measure's Report File, Click Save Measure button below to add this measure to the project proposal.

Uploaded Calculator File Name:	
Uploaded Calculator Version Number:	
Calculation Date:	
*Sector:	Agriculture/Irrigation
*Measure Category:	
*Measure Subcategory:	
*Measure Name:	
*Profile Description:	
*Reimbursement Rate ($/kWh):	Cost CAP (%): (if applicable)
*Is Project New Construction / Major Renovation / Remodel ?:	

*Measure Life (years)	*Estimated Site Energy Savings (kWh/year)	*Estimated Measure Cost ($)	Estimated Change in O&M Cost ($/year)	Estimated Non-Energy Benefits ($/year)	*Customer Retail Rate (Cents/kWh)

*Estimated Energy Savings @Busbar (kWh/year)	*Estimated Energy Cost Savings ($/year)	*Simple Payback (years)	*Present Value O&M Costs ($)	Present Value Non-Energy Benefits ($)	*Present Value Energy Savings ($)	*Measure Benefit/Cost Ratio	*Estimated BPA Credit/ Reimbursement ($)

Complete sections A through E for each separate measure being proposed. See the ***Instructions for Completing Individual Measure Descriptions*** for detailed instructions on filling out this section.

Measure Baseline Description:	
Proposed Measure Description:	
Energy Savings Estimate:	
Proposed Measure Costs:	
Measurement and Verification Plan:	
Estimated Change in O&M Cost and/or Estimated Non-Energy Benefits:	

Click Here to View All Measures << < > >> **1 of 1**

Note: To reflect changes in Measure, Click Save Measure Button

Delete Measure | Save Measure | Add More Measures

V. Project-Level Summary of Calculations

Estimated Energy Savings @Busbar (kWh/year):	
Estimated Project Cost ($):	
Simple Payback (years):	
Estimated Benefit/Cost Ratio:	
Estimated BPA Credit/Reimbursement ($):	

Note: The dollar amounts shown for BPA Credit/Reimbursement are only relevant for BPA-funded projects (CAA, CRC, or IRMP). For NON-BPA-funded projects, this dollar amount is for information purposes only. BPA acceptance of a NON-BPA-funded project proposal does not obligate BPA to provide any credit or reimbursement dollars when the project is completed.

VI.Documentation, Eligibility, and Performance Checklist

To be eligible for BPA credit or reimbursement for energy savings claimed in this proposal, each project or measure must meet following requirements. Check the box that applies for each item. **All boxes must be checked prior to submitting to BPA.**

☐	BPA defined deemed savings or deemed reimbursements are not available for the measures.
☐	The proposed measures have not been purchased or installed
☐	This project does not result in fuel switching.
☐	The measures are designed to result in improvements in the energy efficiency of electricity generation, distribution or use.
☐	The expected life of the energy savings for each measure is greater than one year.
☐	The proposed baseline for each measure is documented and provides a basis for establishing energy savings.
☐	The proposal includes a metering and verification plan showing how energy savings will be verified
☐	The expected project simple payback (Project Cost/Annual Energy Cost Savings) is one year or greater.
☐	The expected project benefit/cost ratio meets the current BPA minimum requirement.

The responses to the eligibility checklist and information provided in this Proposal Template are accurate and complete:

*Name:		*Date:	
*Title:			

Note: Before you submit this to BPA, you must have a cart you can add this proposal to. If you need to Create New Cart, Click Save Proposal, and go create a cart now. Then return to this proposal and Click Submit to BPA.

Save AS A Template | Save Proposal | Submit To BPA

Printer-friendly page...

Your BPA Energy Efficiency Service Team:

Your COTR :

Name:	Grant Vincent
Phone:	
EMail Address:	gwvincent@bpa.gov

Your EER :

Your Engineer :

Brief Guide to Using the Uploadable Custom Project Credit and Cost-Effectiveness Calculator
(Updated September 30, 2008)

1. To create and submit a custom project proposal:

    a. Create a new project or open an existing proposal. (If you open a proposal you started before September 29, you will still use this new method for updating it to submit it.)

        1) Go to Your Account
        2) In the Custom Projects section, click on Submit Proposal
        3) Select an existing draft proposal, or create a new project:
            (1) Click on Create New Proposal
            (2) In the popup, select Create New Project
            (3) Select the sector for the new project
            (4) Type in a name for the project and click Create

    b. Enter the project information in the first three sections as appropriate.

    c. In the Measure Description section of the template, note the current version and release date for the new calculator. If you need to, click "Download a New Copy Here" to get the latest version.

    IMPORTANT—You MUST save the Credit Calculator to your hard drive and open it in Excel. DO NOT use it in the web browser window, because the browser will not allow you to execute some of the important steps.

    d. Use the calculator to describe your measure and generate results for cost effectiveness and reimbursement. Note that you have several more entries or selections to make in this new calculator.

    NOTE—Some of the labels for options in this calculator change depending on your selections on other options. Please read each line carefully as you enter your data. If you miss a selection, you will be prompted for that data when you try to save your results.

    e. Click the Save Results button in the calculator to generate an uploadable report file copy of your measure's results. Save the report file to your hard drive with a meaningful name.
    f. Return to the Custom Project Proposal template and click on "Upload" to upload the file.
    g. In the resulting popup, use the Browse button to locate the file you just saved. Click Open.
    h. With the filename displayed, click the Upload button. A new blank window opens and a progress bar is displayed. When this window closes (or asks you to allow it to close), the upload is done.
    i. Click the Close button and the data will appear in your proposal.
    j. Review the data, enter text into the text fields, and when satisfied, click the Save Measure button to store the measure in the project.
    k. If you have multiple measures, click the Add More Measures button in the template, then repeat steps c-i for each additional measure.
    l. Save and submit the proposal as usual.

    NOTE—you will still add the project to a shopping cart as you submit it, but the Lost Opportunity question has been removed. This information now comes from the calculator.

2. To add verified measure data to a completion report (applies both to projects created before September 29 and new projects created with the uploadable calculator):

a. On the Your Account page, click on "Submit Completion Reports - Create, save, edit and submit project completion reports."

b. Select the completion report you wish to update with measure data.

c. In the Measure Description section of the completion, review the information displayed from the original proposal. If you wish to easily review the original proposal, click on "View Entire Proposal" to display the original in a new window.

d. Note the current version and release date for the new calculator. Click "Download a New Copy Here" to get the latest version if needed.

   IMPORTANT—You MUST save the Credit Calculator to your hard drive and open it in Excel. DO NOT use it in the web browser window, because the browser will not allow you to execute some of the important steps.

e. Use the calculator to generate results for cost effectiveness and reimbursement using your verified data. . Note that you have several more entries or selections to make in this new calculator.

   NOTE—Some of the labels for options in this calculator change depending on your selections on other options. Please read each line carefully as you enter your data. If you miss a selection, you will be prompted for that data when you try to save your results.

f. Click the Save Results button in the calculator to generate an uploadable report file copy of your measure's results. Save the report file to your hard drive with a meaningful name.

g. Return to the Completion Report template and click on "Upload" to upload the file.

h. In the resulting popup, use the Browse button to locate the file you just saved. Click Open.

i. With the filename displayed, click the Upload button. A new blank window opens and a progress bar is displayed. When this window closes (or asks you to allow it to close), the upload is done.

j. Click the Close button and the data will appear in your proposal.

k. Review the data, enter text into the text fields as needed, and when satisfied, click the Save Measure button to store the measure in the project.

l. If you have multiple measures, click the Add More Measures button in the template, then repeat steps c-i for each additional measure.

m. Save and submit the completion report as usual.

Custom Project Credit and Cost-Effectiveness Calculator

BEFORE STARTING A NEW MEASURE, ALWAYS CLICK RESET CALCULATOR

Instructions by line:

Line 1. Select the fiscal year when the PROPOSAL for this project was, or is expected to be approved. If Early Start, use FY2007.

Line 2. Select Yes if this project is New Construction, Major Renovation or Major Remodel. Otherwise select No.

Next: Click the Reset Calculator Button (must be done before calculating each measure, or any time you wish to change the sector.)

Lines 3-6. Select the sector, category, subcategory, and measure closest to your application.

Line 7. Enter a name for your measure that identifies this particular installation.

Line 8. If your project was approved in 2007, select Yes on this line if it was approved prior to Feb 1, or No if approved after. If your project was approved after 2007, ignore this line.

Line 9. For an INDUSTRIAL project approved in 2007-2008, or an INDUSTRIAL RETROFIT project approved AFTER 2008, select reimbursement option 1 or 2 on line 9. For all other sectors, and for 2009-2011 new projects, ignore this line.

Lines 10-14. Enter planned or actual Site Savings, Project Cost, Change in O&M (negative for reductions), Non-Energy Benefits, and Customer Retail Rate (in CENTS) for this measure.

When satisfied with the results for this measure, click "Save Results" and follow the prompts to SAVE an uploadable Report File to your computer. Then follow the instructions in the Report File to upload your measure to the project on the PTR site.

Save Results

Note: All user supplied input assumptions must be documented through a measurement and verification plan that must be submitted to BPA for review. If the project results in savings of 200,000 kWh per year or a projected BPA credit/reimbursement of $30,000

Version 3.02

Calculator Last Revised 10/01/08 | Today is 11/14/2008

CLICK THE RESET CALCULATOR BUTTON TO START A NEW MEASURE: Reset Calculator

Line	*INPUTS*	
1	**Select the fiscal year when the proposal for this project was, or is expected to be approved: ===>**	Select FY
2	**Is This Project New Construction/Major Renovation/Major Remodel (ie. NOT Retrofit)?**	Select Yes or No
	RESET DROPDOWNS (Must be done whenever you select a different Sector)	Reset Measure Option Dropdowns
3	**Select Sector for this project ===>**	Agricultural
4	**Select category for this measure ==>**	Select a Category
5	**Select subcategory for this measure ==>**	Select a Subcategory
6	**Select the specific energy efficiency activity/load profile that best matches this measure ===>**	Select an activity/load profile
	Enter a measure name for this specific measure (include useful identifying information): ===>	
7		
8	**Ignore (only applies to Indust, Comm or Other Projects approved before Feb 2007)**	Ignore
9	**Ignore (only applies to Industrial Projects)**	Industrial Option 1 (lower amount) / Industrial Option 2 (higher amount)
10	**Enter Annual Site Energy Savings (kWh/yr) for this measure**	-
11	**Select Project Construction Type on Line 2**	$ -
12	**Enter Change in Measure O&M Cost (Savings -$ or Increases +$)**	$ -
13	**Enter Measure Annual Non-Energy Benefits**	$ -
14	**Enter Customer Retail Rate (CENTS/kWh)**	0.00 cents
	RESULTS	
15	**Potential Reimbursement ($/kWh)**	Select FY on Line 1
16	**Default Measure Life**	0 years
17	**Annual Energy Savings @ Busbar**	000 kWh
18	**Annual Energy Cost Savings**	$ -
19	**Simple Payback**	0.0 years
20	**Present Value of Change in Operation and Maintenance Cost**	$ -
21	**Present Value Non_Energy Benefits**	$ -
22	**Present Value Energy Savings**	$ -
23	**Measure Benefit/Cost Ratio**	Negative
24	**BPA Measure Reimbursement**	

BPA Incentives ($/kWh) for Custom Project Proposals Approved during the FY 2007-09 Rate Period

(Updated September 28, 2008)

Note: The RTF "Custom Project Credit and Cost-Effectiveness Calculator" is designed to automatically select the appropriate BPA incentive rate ($/kWh) and cost cap (%) based on the sector, project type, and the date the project PROPOSAL was, or is expected to be approved by BPA. Please let us know if the calculator does not appear to be selecting the correct BPA incentive rate or cost cap for your specific project measure. Email: ptrsupport@synergyhq.com Telephone: 1-866-329-5797

		Date the Project PROPOSAL was, or is expected to be Approved											
		Early Start - Jan 2007		Feb 2007 - Sept 2008		Oct 2008 - Sept 2009		Page Numbers in BPA's Implementation Manuals					
Sector	Project Type	Incentive ($/kWh)	Cost Cap (%)	Incentive ($/kWh)	Cost Cap (%)	Incentive ($/kWh)	Cost Cap (%)	Oct 2006	April 2007	Oct 2007	April 2008	Oct 2008	April 2009
Agricultural / Irrigation	Retrofit	$0.15	70%	$0.15	70%	$0.20	70%	86	86	42	44	51	TBD
	New Construction	$0.15	70%	$0.15	70%	$0.27	70%	86	86	42	44	51	TBD
	SIS - Year 1	$0.05	70%	$0.05	70%	$0.05	70%	86	87	43	45	53	TBD
	Transformer DE - Year 1	N/A	N/A	$0.05	70%	$0.05	70%	N/A	N/A	44	46	55	TBD
Commercial	Retrofit	$0.13	60%	$0.13	70%	$0.20	70%	81	69, 81	53	55	59	TBD
	New Construction	$0.20	70%	$0.20	70%	$0.27	70%	83	83	57	59	70 (Eratta 2)	TBD
Industrial - Option 1	Retrofit	$0.12	60%	$0.12	70%	$0.17	70%	87	69, 88	64	66	81	TBD
	New Construction	$0.12	60%	$0.12	70%	$0.27	70%	89	69, 90	63, 64	65, 66	81	TBD
Industrial - Option 2	Retrofit	$0.15	60%	$0.15	70%	$0.20	70%	87	69	65	67	82	TBD
	New Construction	$0.15	60%	$0.15	70%	$0.27	70%	89	69	63, 65	65, 67	82	TBD
Other (non-building)	Any	$0.13	60%	$0.13	70%	$0.13	70%	89	69, 90	42, 57, 65, 79	59	71	TBD
Residential	Retrofit	$0.30	70%	$0.30	70%	$0.30	70%	N/A	N/A	N/A	N/A	117(?)	TBD
	New MF Construction	$0.30	70%	$0.30	70%	$0.30	70%	75	76	78	80	112(?)	TBD

Custom Project Credit and Cost-Effectiveness Calculator Revision History

Document Last Revised : 10/24/2008

Version	Release Date	File Name	Changes
TBD	TBD	TBD	PLANNED changes in future version(s) of the custom project credit calculator: ▪ For Utility Distribution System CVR projects, adjust the calculation of Simple Payback to be consistent with BPA Implementation Manual. ▪ Remove the "Audits" and "Technical Assistance" measurecategories in all sectors. ▪ Remove the "Lighting"custom project category in the Residential sector.
3.02	10/24/2008	CreditCalc_v.3_02.xls (1.87 Mb)	▪ Corrected typos in names for Utility Distribution, Generation, System Connection and Transmission categories in the Industrial sector. ▪ Corrected dropdown selections for Utility Distribution subcategories. ▪ Corrected the measure life for the Agricultural Transformer De-Energization Year1 measure. ▪ Moved Save Results Button to top line and changed instructions to RED to improve usability.
3.01	10/1/2008	CreditCalc_v.3_01.xls (1.88 Mb)	▪ Added two new subcategories in the Industrial sector for compressed air measures. ▪ Increased number of decimal places displayed for Measure Benefit/Cost Ratio (from one to three). ▪ Present Value of Energy Savings calculation corrected so that the "lost opportunity" adder is correctly applied to "New Construction" projects instead of "Retrofit" projects. This change results in slightly higher B/C ratios for new construction projects and slightly lower B/C ratios for retrofit projects, relative to versions 3.0 and 3.0a of the calculator. This change does not impact the calculation of busbar energy savings (kWh) or BPA incentives ($). ▪ Note: As a consequence of the above corrections, from Oct 1 on, you must use at least the 3.01 version of the credit calculator to upload your measures to the PTR. Uploads from Versions 3.0 and 3.0a will be rejected.
3.0a	9/29/2008	CreditCalc_kWh_FY08v3_0a.xls (1.6 Mb)	This version includes corrections to the following category names that did not match the equivalent categories on the PTR site: ▪ Agricultural Irrigation Hardware, Discharge Fitting Equipment ▪ Agricultural SIS Projects, Year1 Proposal ▪ Commercial Process Energy, Pumps & Fans ▪ Industrial Audits ▪ Industrial Motors & Drives, Pumps & Fans ▪ Residential Envelope New / Existing
3.0	9/28/2008	CreditCalc_kWh_FY08v3_0.xls (1.6 Mb)	This new calculator now allows you to upload your measure data instead of hand-entering it. See this document for more information about differences in the procedures and features.

Close Window

Planning, Tracking, and Reporting System
Version 2.0

shopping cart your account help center

Reporting Period:
Fiscal Year 2008: October 1, 2007 to September 30, 2008

Select a Data Query

Reported Data

Multi Year Detail

Multi Year Summary

Reported/Invoiced Data

Data Query Plus

Pipe Line

Custom Projects

Unreported Measures

Others

Report Preview

Home > Your Account > Data Query

Unreported Measures

Utility Name : BPA Utility

Funding Source : All Funding Sources

Extract Data

Questions about the PTR System
Questions about the Conservation Measures
Questions about the Website
Site Design By: Synergy Consulting, Inc.

Privacy Policy

Planning, Tracking, and Reporting System Version 2.0

shopping cart your account help center

Reporting Period:
Fiscal Year 2008: October 1, 2007 to September 30, 2008

Select a Data Query

Reported Data

Multi Year Detail

Multi Year Summary

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Unreported Measures

Others

Report Preview

Home > Your Account > Data Query

Report Preview

Utility Name : BPA Utility

Select a Fiscal Year : Fiscal Year 2008: October 1, 2007 to September 30, 2008

Report Period : Annual Report

Extract Data

Questions about the PTR System
Questions about the Conservation Measures
Questions about the Website
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Privacy Policy

Planning, Tracking, and Reporting System
Version 2.0

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Reporting Period:
Fiscal Year 2008: October 1, 2007 to September 30, 2008

Search By Measure Names & Ref #'s

All

Keyword: Search

Or, try Advanced Search

Efficiency Measures

Commercial
Residential
Industrial
Agriculture/Irrigation
Other

Low-Income

Weatherization
Contributions

Third Party

NEEA Contributions
Commercial
Industrial

Renewable Measures

Renewable Measures

Your Account

New Shopping Cart
My Shopping Carts
My Orders
File Report

BPA Programs

CAA
CRC

Downloads

Downloads

Admin

BPA Administration

Home > Your Account > EER Reports

EER Report Filters

Report Period: Rate Period: October 1, 2006 to September 30, 2009 (including Early Start)

Select an Option: Show Utilities

Utilities: All Utilities

Select a Report:
- (•) Budget and Status Report
- ( ) Reported Expenditures and Savings
- ( ) Custom Projects in Pipeline (by Sector)
- ( ) Custom Projects in Pipeline (by Project Status)

Show Report

e·conservation POWERED BY SYNERGY

Questions about the PTR System
Questions about the Conservation Measures
Questions about the Website
Site Design By: Synergy Consulting, Inc.

Privacy Policy

Report Date : 11/14/2008

Report Name : Budget and Status Report

Report Period : Rate Period: October 1, 2006 to September 30, 2009 (including Early Start)

Utility Name : All Utilities

Table Name: **Utility Load Forecast and Contacts**

Utility Name	Date	PTR Utility ID	BES Utility Number	Forecasted Annual Load on BPA (aMW)	AE	EER	COTR	ENGINEER
	11/14/2008			7877.56				

Table Name: **Credits / Budgets**

	CRC Renewables	CRC Conservation	CRC Total	CAA Total	IRMP Total	Grand Total
Rate Period Credit/Budget ($)	$18,104,884	$100,601,399	$118,706,283	$50,119,766	$1,771,470	$170,597,519
Reported Expenditures ($)	$14,538,071	$49,380,599	$63,918,670	$2,931,130	$458,183	$67,307,984
Remaining Credit/Budget ($)	$3,566,813	$51,220,800	$54,787,612	$47,188,636	$1,313,287	$103,289,535
Percent of Credit/Budget Spent (%)	80.3%	49.1%	53.8%	5.8%	25.9%	39.5%

Note: The IRMP budget figures are for 5 years. All other budget figures are for the current rate period.

Table Name: **Biannual, Annual and Renewables Status**

Biannual / Annual Report	Status
EarlyStart Biannual	
EarlyStart Annual	
FY2007 Biannual	
FY2007 Annual	
FY2008 Biannual	
FY2008 Annual	
FY2008 Renewables Annual	
FY2009 Biannual	
FY2009 Annual	
FY2009 Renewables Annual	

Report Date : 11/14/2008

Report Name : Reported Expenditures and Savings

Report Period : Rate Period: October 1, 2006 to September 30, 2009 (including Early Start)

Utility Name : All Utilities

Table Name: **Reported Expenditures and Savings (including Early Start)**

REPORTED EXPENDITURES & SAVINGS (INCLUDING EARLY START)	Residential	Commercial	Industrial	Agricultural	Other	NEEA (MT)	Low Income	Renewables	Admin	Total
CAA Expenditures ($)	$572,728	$1,154,736	$446,027	$404,322	$0	$0	$0	$0	$353,283	$2,931,096
CRC Expenditures ($)	$20,992,142	$7,902,596	$5,102,446	$2,892,969	$48,478	$2,976,404	$3,784,808	$14,538,071	$5,680,755	$63,918,670
IRMP Expenditures ($)	$136,186	$69,912	$58,565	$164,777	$0	$0	$28,743	$1,827	$0	$460,010
Total Expenditures ($)	$21,701,056	$9,127,244	$5,607,039	$3,462,068	$48,478	$2,976,404	$3,813,551	$14,539,898	$6,034,039	$67,309,776
CAA Savings (aMW)	0.4806	1.1186	0.4499	0.3616	0.0	0.0	0.0	N/A	N/A	2.4108
CRC Savings (aMW)	18.3630	8.2445	5.7595	5.7392	0.0701	4.0783	0.8455	N/A	N/A	43.1000
HWM Savings (aMW)	7.5892	3.6327	3.8859	0.2023	0.0	0.9486	0.0089	N/A	N/A	16.2677
IRMP Savings (aMW)	0.1700	0.0416	0.0446	0.1440	0.0	0.0	0.0021	N/A	N/A	0.4024
Other Utility Savings (aMW)	0.0378	0.0203	0.4013	0.0	0.0	0.0317	0.0022	N/A	N/A	0.4933
Total Savings (aMW)	26.6407	13.0577	10.5413	6.4471	0.0701	5.0586	0.8587	N/A	N/A	62.6741

Table Name: **Reported Expenditures and Savings - Early Start Only**

REPORTED EXPENDITURES & SAVINGS - EARLY START ONLY (INCLUDED IN ABOVE)	Residential	Commercial	Industrial	Agricultural	Other	NEEA (MT)	Low Income	Renewables	Admin	Total
CAA Expenditures ($)	$16,532	$628,719	$0	$161,169	$0	$0	$0	$0	$118,543	$924,963
CRC Expenditures ($)	$1,426,345	$260,701	$0	$153,324	$0	$527,090	$465,541	$0	$302,199	$3,135,200
IRMP Expenditures ($)	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Expenditures ($)	$1,442,877	$889,420	$0	$314,493	$0	$527,090	$465,541	$0	$420,742	$4,060,163
CAA Savings (aMW)	0.0072	0.4927	0.0	0.1451	0.0	0.0	0.0	N/A	N/A	0.6450
CRC Savings (aMW)	0.7309	0.2034	0.0	0.1444	0.0	0.5220	0.2592	N/A	N/A	1.8597
HWM Savings (aMW)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	N/A	N/A	0.0
IRMP Savings (aMW)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	N/A	N/A	0.0
Other Utility Savings (aMW)	0.0216	0.0	0.0	0.0	0.0	0.0	0.0	N/A	N/A	0.0216
Total Savings (aMW)	0.7596	0.6960	0.0	0.2895	0.0	0.5220	0.2592	N/A	N/A	2.5263

Table Name: **Reported Expenditures and Savings - Without Early Start**

REPORTED EXPENDITURES & SAVINGS - WITHOUT EARLY START	Residential	Commercial	Industrial	Agricultural	Other	NEEA (MT)	Low Income	Renewables	Admin	Total
CAA Expenditures ($)	$556,196	$526,017	$446,027	$243,153	$0	$0	$0	$0	$234,740	$2,006,133
CRC Expenditures ($)	$19,565,798	$7,641,895	$5,102,446	$2,739,645	$48,478	$2,449,314	$3,319,266	$14,538,071	$5,378,556	$60,783,470
IRMP Expenditures ($)	$136,186	$69,912	$58,565	$164,777	$0	$0	$28,743	$1,827	$0	$460,010
Total Expenditures ($)	$20,258,180	$8,237,824	$5,607,039	$3,147,575	$48,478	$2,449,314	$3,348,009	$14,539,898	$5,613,296	$63,249,613
CAA Savings (aMW)	0.4734	0.6260	0.4499	0.2165	0.0	0.0	0.0	N/A	N/A	1.7658
CRC Savings (aMW)	17.6321	8.0411	5.7595	5.5948	0.0701	3.5563	0.5863	N/A	N/A	41.2403
HWM Savings (aMW)	7.5892	3.6327	3.8859	0.2023	0.0	0.9486	0.0089	N/A	N/A	16.2677
IRMP Savings (aMW)	0.1700	0.0416	0.0446	0.1440	0.0	0.0	0.0021	N/A	N/A	0.4024
Other Utility Savings (aMW)	0.0162	0.0203	0.4013	0.0	0.0	0.0317	0.0022	N/A	N/A	0.4717
Total Savings (aMW)	25.8811	12.3617	10.5413	6.1576	0.0701	4.5366	0.5995	N/A	N/A	60.1478

DISCLAIMER: These energy savings are for informational purposes, and do not necessarily represent the eligible savings for calculation of the conservation adjustment for determining the Contract High Water Mark.

Report Date : 11/14/2008

Report Name : Custom Projects in Pipeline (by Sector)

Report Period : Rate Period: October 1, 2006 to September 30, 2009 (including Early Start)

Utility Name : All Utilities

Table Name: **Custom Project Proposals - Not Completed with planned M&V completion date before September 30, 2009**

(Approved proposals and submitted proposals in pending status for COTR approval)

CUSTOM PROJECT PROPOSALS, NOT COMPLETED	Residential	Commercial	Industrial	Agricultural	Other	Total
CAA Estimated Incentives ($)	$0	$853,477	$641,920	$319,193	$0	$1,814,590
CRC Estimated Incentives ($)	$32,708	$1,514,848	$9,479,645	$965,005	$1,163	$11,993,368
IRMP Estimated Incentives ($)	$0	$0	$0	$0	$0	$0
Total Estimated Incentives ($)	$32,708	$2,368,325	$10,121,565	$1,284,198	$1,163	$13,807,958
HWM - if BPA funded instead ($)*	$0	$51,104	$832,308	$431,802	$0	$1,315,213
CAA Estimated Savings (aMW)	0.0	0.7432	0.6275	0.3314	0.0	1.7021
CRC Estimated Savings (aMW)	0.0124	1.1956	9.7047	0.8132	0.0010	11.7269
HWM Estimated Savings (aMW)	0.0	0.0450	0.8434	0.6343	0.0	1.5227
IRMP Estimated Savings (aMW)	0.0	0.0	0.0	0.0	0.0	0.0
Total Estimated Savings (aMW)	0.0124	1.9838	11.1756	1.7789	0.0010	14.9517
Number of Projects - CAA	0	10	8	8	0	26
Number of Projects - CRC	4	58	112	45	1	220
Number of Projects - HWM	0	5	9	8	0	22
Number of Projects - IRMP	0	0	0	0	0	0
Total Proposed Projects	4	73	129	61	1	268

* HWM ($) shown are for informational purposes only -- not applicable for HWM Utility Funds.

Table Name: **Custom Project Completions - Not Reported**

(Approved completion reports and submitted completion reports in pending status for COTR approval)

CUSTOM PROJECT COMPLETIONS, NOT REPORTED	Residential	Commercial	Industrial	Agricultural	Other	Total
CAA Actual Incentives ($)	$0	$0	$0	$312,713	$0	$312,713
CRC Actual Incentives ($)	$24,823	$100,354	$819,031	$103,686	$0	$1,047,894
IRMP Actual Incentives ($)	$0	$0	$43,939	$0	$0	$43,939
Total Actual Incentives ($)	$24,823	$100,354	$862,970	$416,399	$0	$1,404,546
HWM, if BPA funded instead ($)*	$0	$46,708	$0	$0	$0	$46,708
CAA Actual Savings (aMW)	0.0	0.0	0.0	0.7468	0.0	0.7468
CRC Actual Savings (aMW)	0.0094	0.0906	0.8375	0.1127	0.0	1.0503
HWM Actual Savings (aMW)	0.0	0.0602	0.0	0.0	0.0	0.0602
IRMP Actual Savings (aMW)	0.0	0.0	0.0535	0.0	0.0	0.0535
Total Actual Savings (aMW)	0.0094	0.1508	0.8910	0.8595	0.0	1.9108
Number of Projects - CAA	0	0	0	2	0	2
Number of Projects - CRC	1	4	14	8	0	27
Number of Projects - HWM	0	7	0	0	0	7
Number of Projects - IRMP	0	0	1	0	0	1
Total Completed Projects	1	11	15	10	0	37

* HWM ($) shown are for informational purposes only -- not applicable for HWM Utility Funds.

Report Date : 11/14/2008

Report Name : Custom Projects in Pipeline (by Project Status)

Report Period : Rate Period: October 1, 2006 to September 30, 2009 (including Early Start)

Utility Name : All Utilities

Table Name: **Custom Projects in Pipeline (by Project Status)**

CUSTOM PROJECTS IN PIPELINE	Number of Projects	Total aMW	Total Dollars ($)
Custom Projects in Pipeline - CAA			
Submitted Proposals in Pending Status*	0	0.0	$0
Accepted Proposals*	26	1.7021	$1,814,590
Completion Reports in Pending Status	0	0.0	$0
Accepted Completion Reports - Not Reported	2	0.7468	$312,713
Total Projects in Pipeline - CAA	28	2.4489	$2,127,303
Custom Projects in Pipeline - CRC			
Submitted Proposals in Pending Status*	4	0.4674	$569,577
Accepted Proposals*	216	11.2596	$11,423,791
Completion Reports in Pending Status	2	0.0668	$37,625
Accepted Completion Reports - Not Reported	25	0.9835	$1,010,269
Total Projects in Pipeline - CRC	247	12.7772	$13,041,262
Custom Projects in Pipeline - HWM			
Submitted Proposals in Pending Status*	1	0.0009	$1,009
Accepted Proposals*	21	1.5219	$1,314,205
Completion Reports in Pending Status	0	0.0	$0
Accepted Completion Reports - Not Reported	7	0.0602	$46,708
Total Projects in Pipeline - HWM	29	1.5829	$1,361,922
Custom Projects in Pipeline - IRMP			
Submitted Proposals in Pending Status*	0	0.0	$0
Accepted Proposals*	0	0.0	$0
Completion Reports in Pending Status	0	0.0	$0
Accepted Completion Reports - Not Reported	1	0.0535	$43,939
Total Projects in Pipeline - IRMP	1	0.0535	$43,939
Custom Projects in Pipeline - All Funds			
Submitted Proposals in Pending Status*	5	0.4683	$570,586
Accepted Proposals*	263	14.4835	$14,552,586
Completion Reports in Pending Status	2	0.0668	$37,625
Accepted Completion Reports - Not Reported	35	1.8440	$1,413,630
Total Projects in Pipeline - All Funds	305	16.8625	$16,574,426

* With planned M&V completion dates before September 30, 2009.

BPA CRC Renewables Report (October to September)

Fiscal Year 2008: October 1, 2007 to September 30, 2008

To file a report for a fiscal year other than the above, please change the fiscal year.

* Report Name:

* = Required information

Instructions:

1. Be sure every renewable activity you include in this report has met the standards outlined in the renewable manual. For each generating renewable activity you should have a location, claimed kWh and dollars of renewable credit claimed. For RD&D and Donations, be sure to include the dollar amounts of renewable credit claimed.
2. Do not aggregate your renewable activities such as solar water heaters or PV installations. Each one should be listed separately with its own location and renewable amounts claimed.
3. When you click the **"Next"** button below, your report will be displayed in the exact format and with exact activities and expenditure details to be transmitted to Bonneville. Review this document carefully for accuracy and completeness because it is your final report and subject to BPA audit rights.
4. At the top of the report page you will see a link for printing an official copy of the report. You may wish to print a hard copy of this report for your files. You do not need to send BPA a hard copy of the report. However, you will need to send BPA all the additional documentation required for the reported measures as defined in the guidelines/manual no later than October 31, unless an extension is granted. This may include certain calculators or other documentation – including third party verification where necessary. If you are uncertain what to send, please contact Jamie Sims at jtsims@bpa.gov.
5. At the bottom of the report page, click on **"Next"** to view the final **checklist**.
6. Check each item on the **checklist** to indicate that you have completed all requirements. Checking these boxes certifies to BPA that all the items submitted meet all the Renewable Option claim requirements to the best of your knowledge.
7. Click on the button at the bottom of the page labeled **"Submit to BPA"**.

You will receive an e-mail confirming you have submitted your report.

***ATTENTION:** Please be sure your internal supporting files and your accounting files match what appears in this report. Please be sure your internal files carry the same report period information and all other identification information provided in this report.The report shall meet the requirements of Section 4 (General Requirements) and Section 9 (Renewables) of the manual.

Next