

# BPA EnergySmart Grocer FY 2012-13 Program Overview

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Gary Smith, BPA

Ray Hartwell, BPA

Jessica Kramer, PECl

Kevin Cote, PECl



# Agenda

- Program Overview
- Scope
- Sign-up and Funding
- Questions

# Program Overview

- BPA has contracted with PECl for delivery of the EnergySmart Grocer (ESG) Program for FY12-13
- Achieved 16 aMW savings over the past four years
- Program changes:
  - Post-2011 Implementation Policy
  - Market opportunity
- Sign-up now available

# Program Scope

- Deemed program is unchanged
- Scale of program activity commensurate with committed incentive
- Options for additional activity:
  - General lighting in participating facilities
  - New construction
  - Existing building commissioning
  - HVAC

# Sign-up and funding

## Utility next steps:

- Work with PECl to establish program budget
- Complete ESG sign-up form and PECl participation agreement
  - Budget and source of funds
  - Program scope

# Funding Sources

- Utilities choose funding source:
  - BPA Turnkey Option – uses utility EEI assigned to BPA for incentives
  - Self-Funded Turnkey Option – utility funds incentives using its own funds
  - Combination
  
- PEI handles paperwork and the check issuance, invoicing BPA or the Utility depending on the funding source
  
- BPA Turnkey Option: utility EEI funds are allocated to a utility-specific ESG incentive account using the COTR request and acknowledgement procedure, then tracked

# Participation Levels

- The level of program activity is scaled with committed rate period incentives:

$\geq \$50,000$	Standard program, including: Field visits, deemed and calculated measures
\$25,000 - \$49,999	Streamlined program, including: End-user outreach training on request, deemed measures only, and audits/calculated measures on case by case basis
$< \$25,000$	PECI must approve participation; if PEGI declines, BPA's customer service engineers provide support for grocery projects

# Participation Levels (cont.)

- BPA is committed to supporting utilities in capturing cost-effective grocery refrigeration potential.
- Actual program activity will vary. Consult with BPA and PECl on how to meet your conservation goals with EnergySmart Grocer.

# Tips for Program Success

- Match funding level to identified potential and utility goals.
- Establish a firm rate period funding commitment at sign up to build an appropriate project pipeline.

# FAQs

Q: How will I track my committed incentive funding?

A: Monthly statements will be provided by PECl.

Q: What happens if I want to reallocate funding to other programs?

A: Changes are allowed once per fiscal year if funding has not been committed to projects.

Q: What happens if the program activity is greater/less than anticipated?

A: Utilities can decrease or increase funding to match demand, within the frequency permitted in the Implementation Manual.

# FAQ Cont'd

Q: Can I commit self-funding and EEI funding?

A: Yes, the sign-up form allows allocation of both self-funding and EEI.

Q: If I self-fund, do I have to pay PEI for implementation?

A: No, BPA covers delivery costs for the program in all cases.

# Custom Projects and ESG

- Custom projects are new
- Sign-up form allows for opting-in to custom projects
- Potential project types in refrigeration facilities:
  - New construction
  - Existing building commissioning
  - HVAC

# Custom Projects Process

- Incentive for ESG custom projects may vary from regular custom projects
- Consult with PECl
- BPA staff will work in tandem with PECl to handle custom projects, including the BPA engineer and programs staff (not utility COTR)

# Questions?

# Sign-up Form

Email completed form to your EER and COTR. Upon COTR written acknowledgement of your completed form, your information will be forwarded to PECI.

**1. Customer Information**

Customer: \_\_\_\_\_  
 Authorized Representative Name: \_\_\_\_\_  
 Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**2. Option Election**

Select one option below. Under all options, PECI is responsible for rebate processing and check issuance, post-installation checks as required, management of required back-up documentation and uploading project data to EE Central.

- BPA Turnkey Option (funded by the Energy Conservation Agreement Implementation Budget)  
*The COTR will make a reduction to the customer's Energy Conservation Agreement Implementation Budget, Exhibit A, in an amount equal to elected funding. BPA will reimburse PECI for incentives paid to end users in the customer's service territory and will review PECI submissions in EE Central for acceptability.*
- Self-funded Turnkey Option (funded by the customer's own funds)  
*Customers will use their own funds to reimburse PECI for incentives paid to end users in their service territory and will review PECI submissions in EE Central for acceptability.*
- Combined BPA Turnkey Option and Self-funded Turnkey Option  
*Customers will initially be enrolled in the BPA Turnkey Option, and when the BPA Turnkey Option funding is depleted, they will be automatically transitioned into the Self-funded Turnkey Option. Customers electing this option must complete funding amounts in section 3 for both the BPA Turnkey Option and the Self-funded Turnkey Option.*

**3. Funding Amount (FY2012-FY2013)**

Provide the funding amount(s) (below) for the program option selected above. Customers must commit a minimum of \$25,000 or be approved for participation by PECI. Approved customers will receive a service agreement from PECI. Non-approved customers will be notified by BPA, and BPA engineers will help customers deliver deemed refrigeration measures outside the Energy Smart Grocer Program.

BPA Turnkey Amount (ECA): \$ \_\_\_\_\_  
 Self-Funded Turnkey Amount: \$ \_\_\_\_\_  
 Total Funding: \$ \_\_\_\_\_

Total Funding Level	Service Description
\$50,000.00 and above	PECI will (1) perform a minimum of two visits per fiscal year (to contractors and/or end users) in customer's service territory, (2) perform requested audits within 60 days of request, (3) provide deemed and calculated measures and (4) provide inspections for projects with total costs over \$10,000.00.
\$49,999.99 and under	PECI may perform one visit (to a contractor/end user) in customer's service territory and will provide (1) a minimum of one end-user outreach training for customer staff (at customer's request), (2) deemed measures only, and (3) audits, calculated measures and post installation inspections on a case-by-case basis at PECI's discretion.

**4. Program Scope**

Program scope automatically includes core refrigeration energy efficiency measures, including lighting in refrigerated spaces, in all potential end-user types (e.g., grocery/convenience stores, restaurants, schools, and other commercial refrigeration equipped facilities). Select additional program components by checking the boxes below.

- Interior and exterior lighting in other areas if a refrigeration project is completed or pursued
- New construction (only in buildings equipped with refrigeration)
- Existing building commissioning (only in buildings equipped with refrigeration)
- HVAC (only in buildings equipped with refrigeration)

**BPA Energy Smart Grocer Program**

**Requirements and Specifications**

The BPA Energy Smart Grocer Program (ESG Program), implemented by Portland Energy Conservation, Inc. (PECI), installs energy efficiency measures in commercial refrigeration equipped facilities (see [EnergySmart](#)). PECI processes and delivers rebate checks to end users, performs post-installation checks as required, manages required back-up documentation and reports installations in EE Central.

BPA funds the program delivery contract with PECI. Customers receive credit for savings achieved in their service territory.

Participating customers must (1) sign a Utility Participation Agreement with PECI and (2) use the COTR Request and Acknowledgement Procedure to deliver a completed ESG Program Sign-up Form<sup>57</sup> (available in EE Central) to their COTR. The sign-up form requires selection of the program option, funding amount<sup>58</sup> and program scope, described below.

Program Component	Description	
Program Option	BPA Turnkey	BPA will reduce the customer's ECA implementation budget by the allocated amount and will pay PECI for program incentives using these funds. BPA will review PECI submissions in EE Central for acceptability.
	Self-funded Turnkey	The customer will pay PECI for program incentives using its own funds and will review PECI submissions in EE Central for acceptability.
	Combined BPA Turnkey and Self-funded Turnkey	Customers will initially be enrolled in the BPA Turnkey Option, and when the BPA Turnkey Option funding is depleted, they will be automatically transitioned into the Self-funded Turnkey Option.
Funding Amount <sup>59</sup>	\$50,000.00 and above	PECI will (1) perform a minimum of two visits per fiscal year (to contractors and/or end users) in customer's service territory, (2) perform requested audits within 60 days of request, (3) provide deemed and calculated measures and (4) provide inspections for projects with total costs over \$10,000.00.
	\$49,999.99 and under	PECI may perform one visit (to a contractor/end user) in customer's service territory and will provide (1) a minimum of one outreach training for customer staff (at customer's request), (2) deemed measures only and (3) audits, calculated measures and post installation inspections on a case-by-case basis at PECI's discretion. Customers must commit a minimum of \$25,000 or be approved for participation by PECI. Approved customers will receive a Utility Participation Agreement from PECI. Non-approved customers will be notified by BPA, and BPA engineers will help customers deliver deemed refrigeration measures outside the ESG Program.

<sup>57</sup> Customers already enrolled in the ESG Program that wish to continue their participation must immediately complete and submit the ESG Sign-up Form. EERs will outreach to utilities' to assist enrollment into the ESG program, and coordinate with PECI to inform them a Utility Participation Agreement is needed.

<sup>58</sup> For assistance determining funding potential, contact Jessica Kramer ([jkramer@peci.org](mailto:jkramer@peci.org)) or Gary Smith ([gsmith@bpa.gov](mailto:gsmith@bpa.gov)) at BPA.

<sup>59</sup> Funding amounts are for the rate period.

# Implementation Manual

# Implementation Manual (cont.)

Program Scope	<p>In addition to core refrigeration measures, including lighting in refrigerated spaces, the customer may select one or more of the following program scope add-ons:</p> <ul style="list-style-type: none"> <li>• Interior and exterior lighting in other areas if a refrigeration project is completed or pursued</li> <li>• New construction (only buildings equipped with refrigeration)</li> <li>• Existing building commissioning (only buildings equipped with refrigeration)</li> <li>• HVAC (only buildings equipped with refrigeration)</li> </ul>
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After the initial sign-up and funding commitment, a customer may later make ESG Program changes (under the parameters of the table below) by submitting a revised ESG Program Sign-up Form through the [COTR Request and Acknowledgement Procedure](#).

Change Type	Frequency Allowed	Effective Date
Program Option	Once per fiscal year	Within 30 days after request
Funding Increase	Twice per fiscal year	Within 30 days after request
Funding Decrease	Once per fiscal year	Within 60 days after request
Program Scope	Once per fiscal year	Within 60 days after request

If customers decrease their funding amount or withdraw from a program component, they must notify PECL at least 60 days in advance to verify that in-process projects have secured rebates.

Customers will receive a monthly accounting of the funds spent in their service territories.

If BPA Turnkey Option funds allocated to the program have not been spent on the first day of the final quarter of the rate period, BPA may (1) add all or a part of unspent funds to the customers' ECA implementation budget, (2) add all or a part of the unspent funds to the Unassigned Account or (3) use all or part of the unspent funds for work under the ESG Program. BPA will determine the use of unspent funds based on (1) program potential in the customer's service territory relative to funding available and (2) the customer's wishes.

**Additional Documentation Requirements**

No additional requirements.

**Reimbursement**

Reimbursement rates are in EE Central. Customers using BPA funds are eligible for a [performance payment](#).