

Efficiency Forward Project

Status Update
January 2018

Bonneville
POWER ADMINISTRATION



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.

Initiatives

2017 Initiative Summary

Ongoing Projects

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
	Increase Rate Period Rollover		Rate Period Implementation Manual
	Bilateral Transfer Enhancement		SRR Customer Assistance
			IM Process Improvement

2018 Initiative Additions

New Projects	
	Determination Enhancement Project
	Custom Project process improvement
	Simplify EE's approach to external forms
	Assess effectiveness of biweekly internal updates
	Proactively promote and support measures or programs that directly benefit the utility or all utility customers
	PENDING: SRR targeted projects

Completed Projects

Completed Projects and Leads



Increase Rate Period
Rollover
(Project Lead: Dena Hilde)



Increase BPA's Self-Funding
(Project Lead: Mark Ralston)



Customer Service Protocol
(Project Lead: Dave Moody)



IM Process Improvement
(Project Lead: Danielle Walker)



Bilateral Transfer Enhancement
(Project Lead: Mary-Beth Evans)



Assess Rate Period
Implementation Manual
(Project Lead: Danielle Walker)



SRR Customer Assistance
(Project Lead: Dan Villalobos)

Completed

Increase BPA's Self-Funding (Project Lead: Mark Ralston)

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. Updated guidance document published. Communicating reporting requirements, preparing to track and report progress toward 30% self-funding goal.



Completed

Increase Rate Period Rollover (Project Lead: Dena Hilde)

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: Completed rollover into FY18 rate period. Successfully minimized unspent funds.



Completed

Bilateral Transfer Enhancement (Project Lead: Mary-Beth Evans)

Goal:

Streamline the process of transferring EEI funds between customers.

Process:

Effective Nov. 1, 2016, BPA allowed customers to authorize a third party to request BPA to transfer funds on their behalf without customer signatures as long as both parties involved have an agreement with the same third party.

Status: The new policy was approved and in place in the IM and has been communicated with customers. IDEA group customers have adopted this approach.



Completed

Customer Service Protocol (Project Lead: Dave Moody)

Goal:

EE organization has a clear understanding of the roles and responsibilities associated with customer communication and follows established roles and norms.

Process:

Ensure Customer Representatives are aware of ongoing communication and are able to effectively coordinate customer communication to ensure consistent, efficient, and effective customer interactions.

Status: Program Marketing maintains the protocol & provides support to ensure the protocol is followed.



Completed

Assess Rate Period Implementation Manual (Project Lead: Danielle Walker)

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



Completed

SRR Customer Assistance (Project Lead: Dan Villalobos)

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.



Completed

IM Process Improvement (Project Lead: Danielle Walker)

Goal:

The desired end-state was for EE to have a process for updating and publishing the Implementation Manual that results in less internal strife between individuals and groups, increased productivity, and less work needed to publish the IM.

Process:

This effort convened an internal EE team to build on a prior phase of improvements. Recommendations reflected experiences and lessons learned from the October 1, 2016 publication of the IM.

Status: Thirteen recommendations adopted for implementation 2/10/17



Ongoing Projects

Ongoing Projects and Leads



Energy Efficiency Value Proposition
(Project Lead: Allegra Hodges)



Reassess BPA's Determination of its Energy Efficiency Goal
(Project Lead: Danielle Walker)



Evaluate EE's Approach to Compliance and Reliability
(Project Lead: Jess Kincaid)



EE System Stabilization
(Project Lead: Adam Morse)



Determination Enhancement
(Project Lead: Dena Hilde)



Establish a Proactive Approach to Promote/Support Measures with direct utility benefit
(Project Lead: Dan Villalobos)



Custom Project Process Improvement
(Project Lead: Ashley Kallberg)



Simplify Approach to External Forms
(Project Lead: Danielle Walker)

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Ongoing Projects:

Continued from 2017



Energy Efficiency Value Proposition (Project Lead: Allegra Hodges)

Goal:

Better quantify the value of the energy efficiency BPA acquired and incorporate that information into its future decision-making processes.

Process:

BPA plans to work with customers and stakeholders on best practices and clear and consistent means to express the value of energy efficiency.

Status:

Monitor progress of improving the Resource Program as it is the focal point of advancing BPA's modeling and analytics. BPA will consider updating the Focus 2028 model or developing other analytical tools/models in concert with the Council to inform a discussion of benefits of the EE program.



EE

Reassess BPA's Determination of its Energy Efficiency Goal (Project Lead: Danielle Walker)

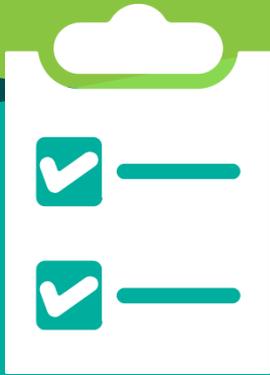
Goal:

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: Draft conservation supply curves delivered in December. Final supply curves and draft report are in-process with updates from the RBSA results. DER supply curves in-process and nearing draft. Expect public engagement on Resource Program results in spring 2018. Goal determination process to follow the Resource Program completion.



Evaluate EE's Approach to Compliance and Reliability (Project Lead: Jess Kincaid)

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.



EE System Stabilization (Project Lead: Adam Morse)

Goal:

Stabilize and incrementally improve our current reporting system, and establish a long-term systems strategy to execute it.

Process:

Work with EE and IT to plan and execute system improvements. Develop a long term strategy for internal and external engagement.

Status:

- IS2.0: Continued to work on defects & enhancements
- EE Tracker: Continued to work on defects & enhancements
- Strategy: Business case for system replacement presented to Power Prioritization Team. Scheduled for APSC presentation on January 25th.



Ongoing Projects:

New for 2018



Determination Enhancement (Project Lead: Dena Hilde)

Goal:

Improve the communication and consistency of sector and measure determinations.

Process (draft):

Design initiative to:

- 1) Provide access to the tracking log to others in Energy Efficiency, and
- 2) Provide guidance that could accompany the communications protocol regarding the type of issues to be logged.



Custom Project Process Improvement (Project Lead: Ashley Kallberg)

Goal:

Streamline the custom project tracking process to make data more valuable for engineers, planners, and programs staff.

Process (draft):

- 1) Develop comprehensive, web-based list for project tracking; ensure all relevant elements of multiple existing lists are captured.
- 2) Develop workflows around custom project process, dates, status.
- 3) Develop reports to meet cross-organizational needs
- 4) Work with process owners to update documentation.



Simplify Approach to External Forms (Project Lead: Danielle Walker)

Goal:

Streamline data required from forms, standardize form elements, develop a change control approach.

Process (draft):

- 1) Compile required forms for comparison
- 2) Identify stakeholders
- 3) Determine what data is needed from forms
- 4) Develop proposal for standardizing elements
- 5) Develop proposal for change control



Establish a Proactive Approach to Promote/Support Measures with direct utility benefit (Project Lead: Dan Villalobos)

Goal:

Communicate value proposition for measures that directly benefit utilities.
Remove barriers to participation.

Process (draft):

- 1) Identify candidate measures/programs
- 2) Identify value proposition
- 3) Identify barriers to participation
- 4) Develop tools to support uptake of utility-benefit measures
- 5) Reach out directly to customers that may benefit
- 6) Implement select case-study projects



Thanks!

Any questions?

Contact Allegra Hodges
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