BPA Energy Efficiency
Option 1 Custom Project Calculator v.2.0 Instructions

Revised 5/6/2014

Table of Contents

Purpose of Option 1 Custom Project Calculator

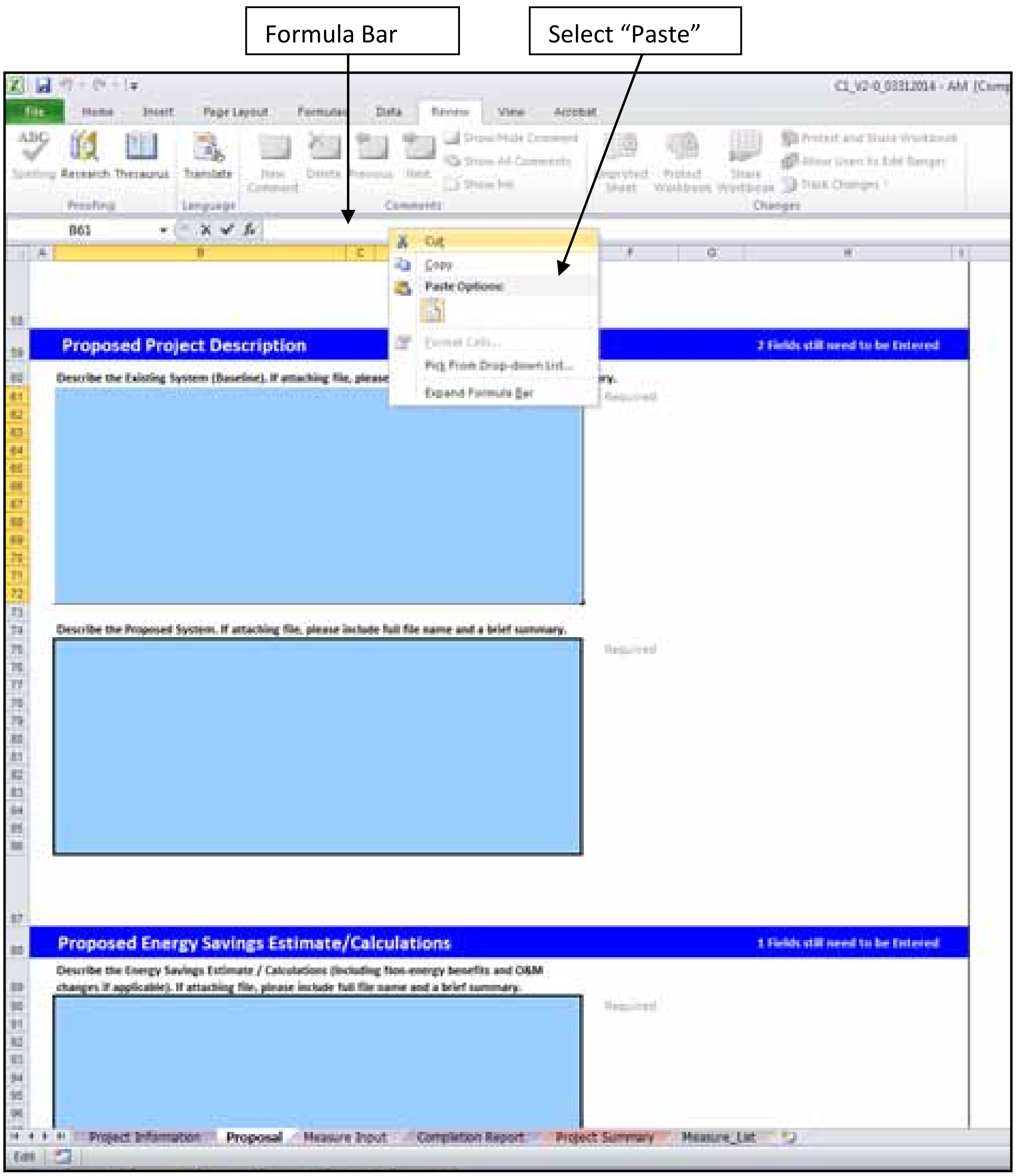
The new calculator and associated processes replace the Option 1 calculator versions 1.0 – 1.4. It implements the new rules and procedures included in the April 1, 2014 Implementation Manual. Previous versions of the calculator will still be accepted by the Customer Portal, but customers are encouraged to utilize the new version 2.0 for enhanced usability and alignment with current program rules. The Option 1 Custom Project Calculator is used to report all reportable Custom Projects completed by Option 1 utilities or any project using the Large Project Fund or progress payments. Use this calculator to complete the Proposal, measure details and B/C calculation, and Completion Report. Funding sources for these projects will include Energy Efficiency Incentive (EEI), Large Project Fund, and self-funding (i.e., not BPA funds). Non-reportable projects should be entered into the Option 2 calculator.

General Guidelines

- Cells are colored blue before data is entered and turn gray after data is entered. For the “Measure Inputs” tab, data should be input in the white cells.
- Fields with a ‘Required’ to the right of the cell must be completed for submission and are necessary to allow calculator to complete all calculations.
- After project information is entered on the proposal and/or completion report tabs, and measure information is entered on the Measure Input tab, summary project calculations will auto-populate in the “Project Summary” tab. After project information is entered on the proposal and completion report tabs, and measure information is entered on the Measure Input tab, summary project calculations will auto-populate in the “Project Summary” tab.
- Some error checking is done within each input sheet. Additional error checking can be found at the bottom of “Project Summary”

Data Entry Tips

- When entering information in the large text fields (existing system, proposed system, M&V plan, etc), please label measure specific information (i.e. Measure 1, Measure 2). Use “Alt-enter” to move to a new line to enter each measure information
- If attaching a file with additional information, please include the full name of the file in the appropriate text field to ensure reviewers associate the correct file with each field.
- To copy and paste, copy the text you would like to paste, click in the destination cell, click on the formula bar (top); Paste (right click, and select “Paste”) Attempting to copy and paste directly in the cell will produce errors. See the screenshot below.



Submitting a Proposal

To complete a proposal, enter all required fields in “Project Information” tab, “Proposal” tab and in “Measure Input” enter all fields required at the Proposal stage. You can review the resulting data (for the proposal stage) in the Project Summary. The measure RefNo(s) and estimated (Proposal) values in the Measure Input tab must be completed before the Proposal Eligibility Checklist can be completed.

Submitting a Completion Report for a project with a pre-approved Proposal

To complete the completion report, first update the “Measure Input” tab with actual data, then complete the “Completion Report” tab. Many fields in the “Completion Report” tab are calculated and will pull information directly from the Proposal.

Submitting a Completion Report for a project without pre-approved Proposal

Complete tabs labeled “Project Information”, “Measure Input”, and “Completion Report.” In “Measure Input” tab, include the Measure Refno and name, but do not complete the “Estimated” fields.

Project Information Tab Definitions

Row	Field	Definition
Project Information		
2	**Are you submitting a Proposal?**	Yes or No: Select “Yes” if a proposal is being submitted to BPA for pre-approval. If only a Completion Report is being submitted and there is no previously-approved proposal, select “No.”
4	**Project Name**	User-defined project name.
5	**Company Name**	Name of the utility's retail customer for the retail electric account applicable to this custom project measure.
6,7,8,9,10	**Company Mailing Address, City, State, Zip**	Mailing address of company applicable to this project.
11	**Facility Street Address**	Physical street address of facility where project is located.
12,13,14	**Facility City, State, Zip**	City, state, and zip code of facility where project is located.
15	**Building Name**	Name of building in which project is located.
16	**Project Contact Name**	Contact Employee at facility where project is located.
17	**Project Contact Job Title**	Job title of contact at facility.
18,19	**Project Contact Phone Number, Email**	Contact information of contact at facility.
20	**Energy Smart Industrial Partner (ESIP) or Outreach Engineer Name**	If industrial, name of Energy Smart Industrial Partner supporting project. If commercial, name of BPA Outreach Engineer supporting project, if any.
21	**Project Sector**	Sector of building (use dropdown menu)
22	**Primary Building Use**	Building use of the majority of the building square footage (use dropdown menu).
23	**Secondary Building Use**	Additional building use of the project building (use dropdown menu). For example, a mixed use building that is 75% office and 25% retail would select medium office as Primary Building Use and high end retail as Secondary Building Use.

Row	Field	Definition
24	**Process Type (Industrial Sector Only)**	For industrial projects, the type of industrial process used in the building. Choose the process type that most closely resembles the industrial process in the project.
25	**Resource Opportunity Type**	Type of project (Retrofit, Major Renovation, New Construction: use dropdown menu). Refer to the Implementation Manual Definitions for definitions of Retrofit, Major Renovation, and New Construction.
26	**Federal? (Yes/No)**	Yes or No: Select "Yes" if the project is taking place in a federally-owned facility.
27	**Utility-Assigned Project ID**	A project ID assigned by the utility. This ID may be an ID assigned for the utility's tracking system. **This field must be entered to calculate savings on the "Project Summary" tab.**
28	**Unique Site ID**	An ID that is unique to this site. Often the customer account number is used in order to pull billing data. This may be the same ID as row 30 (Utility-Assigned Project ID).
29	**Is this project associated with an Energy Project Manager via the Energy Smart Industrial Program?**	Yes or No: Select "Yes" if there is an industrial Energy Project Manager through the BPA program associated with the project.
30	**Associated Energy Project Manager Name (First name, last name)**	Name of Energy Project Manager, if "Yes" selected in row 34.
31	**Technical Service Provider (TSP) Number**	TSP Service Provider number if a TSP was used on the project.
32	**Brief Project Summary**	Short summary of the project.
33	**Utility Retail Rate ($/kWh)**	Average retail rate for customer at project location. This rate is used to calculate the value of energy savings for the project simple payback. Format should be in $/kWh (example: $0.05 if rate is 5 cents per kilowatt hour).
38	**BPA Use Only: BPA-Assigned Project ID**	BPA-Assigned Project ID generated by IS2.0 system. To be generated and populated by BPA after initial project submittal.
Row	**Field**	Definition

Proposal Tab Definitions

1. Complete "Proposal" tab

Proposal Information	Brief Project Summary	Short summary of the project.
3	**Date Proposal Submitted**	Date submitted to BPA COTR.
4	**Proposal Submitter Name**	Name of contact submitting proposal to BPA.
5	**Proposal Submitter Email**	Title of contact submitting proposal.
6	**Proposal Submitter Phone**	Phone number for contact submitting proposal.
7	**Estimated Project Start Date**	Estimated date project will begin. For Proposals, this date determines the eligible reimbursement rate.
Estimated (Proposal) Funding and Payment Information		
10	**Would you like to request EEI as a percentage of total available reimbursement? (if no, request based on dollar amounts)**	Yes or No: Select "Yes" if you would like to use percentages to designate how much of the Total Available BPA Reimbursement you are requesting (i.e. 50%). Select "No" if you would like to use dollar amounts to designate how much of the Total Available BPA Reimbursement you are requesting (i.e. $10,000).

Row	Field	Definition
12	**Do you plan to use Large Project Fund?**	Yes or No: Select "Yes" if you intend to request Large Project Fund funds.
15	**Percentage BPA Reimbursement requested in EEI**	**If selected Yes in row 10,** enter the percentage of the total available BPA reimbursement that you plan to request from your EEI budget. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary." This is used for planning purposes only. The final request is input on the completion report.
16	**Percentage BPA Reimbursement requested in LPF**	**If selected Yes in rows 10 and 12,** Enter the percentage of the total potential BPA reimbursement that you plan to request from the Large Project Fund. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary." This is used for planning purposes only. The final request is input on the completion report.
17	**Percentage of funds not requested from BPA**	**Calculated field.** The percentage of the total available BPA reimbursement that you will not request from BPA is calculated. If self-funding, this may equal the self-funding percentage. However, self funding savings may be adjusted based on the expected total payment to end user.
20	**Dollar amount BPA Reimbursement requested in EEI**	**If selected No in row 10,** enter the dollar amount of the total available BPA reimbursement that you plan to request from your EEI budget. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary." This is used for planning purposes only. The final request is input on the completion report.
21	**Dollar amount BPA Reimbursement requested in LPF**	**If selected No in row 10 and Yes in row 12,** Enter the dollar amount of the total potential BPA reimbursement that you plan to request from the Large Project Fund. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary." This is used for planning purposes only. The final request is input on the completion report.
22	**Dollar amount of funds not requested from BPA**	**Calculated field.** The amount of the total available BPA reimbursement that you will not request from BPA is calculated. If self-funding, this may equal the self-funding percentage. However, self funding savings may be adjusted based on the expected total payment to end user.
24	**Expected Total Payment to end user**	**Required for all projects when you request a reimbursement amount from BPA that is less than the maximum BPA reimbursement.** Enter total anticipated payment to the end user. You may wish to complete this after completing the "Measure Input" sheet and reviewing the "Project Summary."
25	**Are you requesting Progress Payments?**	Yes or No: Select "Yes" if the project meets the eligibility requirements in the Implementation Manual for Progress Payments and you plan to request Progress Payments. If "Yes," complete the Request for Progress Payments section beginning in row 29.
27	**Utility End user payment rules (for utility use – optional)**	**Optional field.** Available for use if you would like to note internal utility rules used to calculate end user reimbursement. For example, 50% of project cost, $0.15/kWh.

Row	Field	Description
Request for Progress Payments		
31	**1. The time period from the BPA custom project proposal approval date to the completion report submittal date meets or exceeds 12 months**	Yes of No: Answer must be "Yes" to be eligible for progress payments.
32	**2. The amount of each progress payment is $100,000 or greater**	Yes of No: Answer must be "Yes" to be eligible for progress payments.
33	**3. The estimated incentive for the project is $250,000 or greater**	Yes of No: Answer must be "Yes" to be eligible for progress payments.
34	**4. The sum of the progress payment does not exceed the lower of (a) 70% of actual expenditures of the project incurred up to the date of the progress payment invoice to BPA or (b) 50% of the estimated total project incentive**	Yes of No: Answer must be "Yes" to be eligible for progress payments.
38-50	**Summary**	Provide a summary of the progress payment request, including how many milestones are expected, the total amount of reimbursement, and expected dates of milestones.
Additional Project Information		
55	**Third Party Contract Number**	This is for **Third Party Use ONLY**. The third party should enter the contract number for the Third Party Program implemented with the measure.
56	**Audit Tracking Number**	Optional field.
57	**Container Name**	Optional field.
Proposed Project Description		
61-72	**Describe the Existing System**	Baseline conditions must be established for energy use, and, as needed, a baseline must be established for production levels, weather, operating schedules, etc. For existing equipment being replaced for energy savings, the baseline may be based on the existing equipment efficacy and hours of operation. For planned replacements, new construction, and major renovations, the baseline may be based on standard practice, energy codes, and related standards. In all cases, the chosen baseline must be appropriate to the situation and reasonable in the context of provide a providing reliable floor from which to measure energy savings. If attaching files with additional information, please provide a brief summary of the contents and include the full file name.
75-86	**Describe the Proposed System**	Describe specifically what is to be done and how the proposed system will save energy. Describe the proposed equipment performance, quantities, and locations. The extent of this description should match the scale of the proposed system.

Row	Field	Description
Proposed Energy Savings Estimates/Calculation		
90-101	**Describe the Energy Savings Estimates/Calculations**	Include complete calculations of estimated average annual electric energy savings in kilowatt-hours per year (kWh/yr). Calculations should be based on commonly accepted standard engineering practices. Identify any periodic variations in plant operation causing changes in energy consumption of more than 10 percent from month to month. Show how production rates of estimated energy consumption (kWh/yr) were derived (e.g. theoretical calculations, field measurements, manufacturer's data, etc.) and what assumptions were made in determining the energy savings estimate. Calculations should be clear and easy to follow. If attaching files with additional information, please provide a brief summary of the contents and include the full file name.
Measurement and Verification (M&V) Plan		
105-116	**Describe the Measurement and Verification Plan**	If multiple M&V plans will be used for different measures, include all plans here or attach additional plans. Describe the Measurement and Verification Plan. In the description, please include the following information: - Baseline conditions: current practice or pre condition? -Pre metering: whole building, affected end use, or none? -Post metering: whole building, affected end use, or none? -Model type: engineering, regression, or indexing? Include a detailed plan to measure the energy consumption at an average system output within a specified time period (e.g., 1 week) and extrapolate to an annual basis. If the energy consumption varies by more than 10 percent from month to month, sufficient measurements must be taken to document the differences. If applicable, include a one-line diagram showing proposed metering locations both before and after the installation. Include a brief description of the instrumentation to be used, the calibration procedure, and the measurement duration and/or data sampling intervals. Also include details on who will perform verification and when it will be performed, including a detailed metering schedule. If measurement is not possible, a detailed explanation justifying request for variance from this requirement is required. In addition, include a proposed factor, if required, for changes in production, weather, occupancy, or other factors which affect the actual energy savings. Refer to the “BPA M&V Protocol Selection Guide” and BPA M&V Protocols in the Implementation Manual Document Library. If attaching files with additional information, please provide a brief summary of the contents and include the full file name.
118	**Select M&V Protocol Utilized**	Drop down list: select the M&V protocol used in the project. See link in row 119 to reference complete M&V protocols.
120	**Estimated M&V Completion Date**	Enter estimated date of M&V completion.

Row	Field	Description
Estimated Project Costs		
124-136	**Describe the Estimated Project Costs**	Include detailed estimates of the project costs. Itemize major pieces of equipment to be installed, removed, or replaced, and include quantities and costs associated with each piece of equipment. Customers are encouraged to submit (as Appendices to this Proposal) separately-generated Project Cost Estimate documents and/or written quotes from suppliers of the major pieces of capital equipment. Examples of Project Costs: 1. Solely allocated administrative costs. 2. Energy review costs including in-house engineering design (staff or contract) and Proposal preparation costs. 3. Equipment costs. 4. Equipment installation costs (including labor and overhead for facilities doing their own installation). 5. Equipment removal or abandonment-in-place costs. 6. Instrumentation and data collection costs to verify Energy Savings. 7. Permit or inspection fees. 8. Sales tax. If you have a project cost question, please contact your COTR. If attaching files with additional information, please provide a brief summary of the contents and include the full file name.
Eligibility Criteria Checklist		
140	**1. This project does not result in fuel switching.**	Yes or No: Answer must be “Yes” to be eligible for reimbursement.
141	**2. The measures are designed to result in improvements in the efficiency of electricity generation, distribution or use.**	**Calculated.** Will populate “Yes” if the project has energy savings. Answer must be “Yes” to be eligible for reimbursement.
142	**3. The expected life of the energy savings for each measure is greater than one year.**	Yes or No: Answer must be “Yes” to be eligible for reimbursement. Refer to Column AU in “Measure Input” tab to verify measure life.
143	**4. The proposed baseline for each measure is documented and provides a basis for establishing energy savings.**	**Calculated.** Will populate “Yes” if baseline information is entered in rows 61-72. Answer must be “Yes” to be eligible for reimbursement.

Row	Field	Description
144	**5. The proposal includes a metering and verification plan showing how energy savings will be verified.**	**Calculated.** Will populate "Yes" if baseline information is entered in rows 105-116. Answer must be "Yes" to be eligible for reimbursement.
145	**6. The expected project benefit/cost ratio meets the current BPA minimum requirement.**	**Calculated.** Will populate "Yes" if project meets defined B/C ratio requirements.
147	**Estimated TRC B/C Ratio at Proposal**	**Calculated.** Calculated based on data on Measure Input tab.
149-205	**BPA Approval and Checklists**	Do not enter information here. BPA Approval section for BPA use only. BPA Project ID will be assigned by the BPA reporting system.

Measure Input Tab Instructions (at Proposal Stage)

The measure input tab is used to collect data on the individual measures within a project at both the proposal (optional) and completion report stage. Therefore, at the proposal submission stage there will be some blank columns for the completion report data. This section outlines the data to be input at the proposal stage. If the user has opted not to submit a proposal and has selected "No" to "Are you submitting a proposal" on the Project Information tab, all proposal values on the measure tab are optional. Enter information in all white cells, starting with cell B8. See rows 4 and 5 of the "Measure Input Tab" for instruction on which inputs are optional or required or same as proposal (i.e., do not change the data from the proposal stage). Enter multiple measures in a contiguous block of data. That is, do not have blank rows between measure data. Maximum number of allowable measures is 100.

Column	Field	Instructions
Measure Inputs		
B	**Measure Refno** (Reference Number)	The RefNo can be found on the tab labeled "Measure List". To find a RefNo, use the auto filtering abilities to filter first by Column B: Resource Opportunity Type (new construction/major renovation or retrofit), then Column C: Sector, then Column D: End Use, then Column E: Category and finally Column F: Technology/Activity/Practice. Select the appropriate RefNo in column A and copy and paste into Column B of "Measure Input." For a multiple measure project, all RefNos must have the same Resource Opportunity Type and Sector. RefNos must match the sector of the project as input in the proposal data.
C	**Measure Name**	This column is a user-defined name to refer to a specific measure.
Measure Cost		
D	**Estimated (Proposal) $**	Enter the estimated measure cost in dollars.
Site Savings		
F	**Estimated (Proposal) kWh**	Enter the estimated savings over baseline in kWh.
Annual Non-Energy Benefits		
H	**Estimated (Proposal) $/year**	This column is for reporting the non-energy benefits. Enter the estimated value of non-energy benefits. These may include water savings, or gas savings.
Annual Operations and Maintenance (O&M) Cost Change (cost savings is negative)		
J	**Estimated (Proposal) $/year**	This column is for reporting the actual change in annual O&M cost (if any) resulting from the installation of this measure. If the change in O&M cost is periodic (e.g. occurs once every three years), the value entered should be an average annual amount over the pre-assigned life of the measure. A "savings" (reduction) in annual O&M cost should be reported as a negative (-) dollar amount and will be treated as a "benefit" in the TRC calculation. An increase in annual O&M cost should be reported as a positive (+) dollar amount and will be treated as a "cost" in the TRC calculation.
Measure Error Flags		
AW	**Measure Refno Error**	Error will appear when the refno entered in column B does not match a measure on "Measure List". Please re-enter a valid RefNo.
AX	**Sector Error Flag**	Sector error flag will appear when the sector of the measure entered does not match the sector of the project (Proposal D24). Please re-enter a valid RefNo.
AY	**Resource Opportunity Error Flag**	Resource Opportunity error flag will appear when the Resource Opportunity Type (Proposal D28) does not match the Resource Opportunity Type of the measure (Measure List Column B).

Measure Input Tab Instructions (at Completion Report)

Column	Field	Instructions
Measure Cost		
E	**Actual (Completion Report) $**	Enter the actual measure cost in dollars.
Site Savings		
G	**Actual (Completion Report) kWh**	Enter the actual verified savings over baseline in kWh.
Annual Non-Energy Benefits		
I	**Actual (Completion Report) $/year**	This column is for reporting the estimated value of non-energy benefits. These may include water savings, or gas savings.
Annual O&M Cost Change (cost savings is negative)		
K	**Actual (Completion Report) $/year**	This column is for reporting the actual change in annual O&M cost (if any) resulting from the installation of this measure. If the change in O&M cost is periodic (e.g. occurs once every three years), the value entered should be an average annual amount over the life of the installed measure. A "savings" (reduction) in annual O&M cost should be reported as a negative (-) dollar amount and will be treated as a “benefit” in the TRC calculation. An increase in annual O&M cost should be reported as a positive (+) dollar amount and will be treated as a “cost” in the TRC calculation. Enter the actual change in Operations & Maintenance cost. If cost savings result, the change should be entered as a negative quantity.

Completion Report Tab Instructions

Row	Field	Definition
Project Information		
3	**Project Name**	**Calculated** from Proposal tab
4	**Date Submitted**	Date submitted to BPA COTR.
5	**Actual Project Start Date**	Date project installation began.
6	**M&V Completion Date**	Date measurement & verification was completed.
7	**Completion Report Submitted by**	Name of contact at utility submitting completion report to BPA.
8	**Was project approved for large project fund?**	Yes or No. Select Yes if project was approved for Large Project Fund and will use of LPF funds. (dropdown)
9	**BPA Assigned Project ID**	**Calculated** from Proposal tab.
Completion Report Funding Information		
12	**Would you like to request EEI as a percentage of total available reimbursement? (if no, request based on dollar amounts)**	Yes or No: Select “Yes” if you would like to use percentages to designate how much of the Total Available BPA Reimbursement you are requesting (i.e. 50%). Select “No” if you would like to use dollar amounts to designate how much of the Total Available BPA Reimbursement you are requesting (i.e. $10,000).
14	**Total Available BPA Reimbursement (using project cost caps)**	**Calculated.** The total available BPA reimbursement based on data input in the Measure Input tab. Equal to the lesser of the project cost cap (Project Summary cell C23) or sum of measure level reimbursement (Project Summary cell C24).

17	**Percentage BPA Reimbursement requested in EEI**	**If selected Yes in row 12,** Enter the percentage of the total available BPA reimbursement that you are requesting in EEI from BPA. The percentage entered in this cell will calculate the Requested BPA Reimbursement – EEI in row 27. Changing this percentage will change the amount of EEI you receive from BPA. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary".
18	**Percentage BPA Reimbursement requested in LPF**	**If selected Yes in rows 8 and 12,** Enter the percentage of the total available BPA reimbursement that you are requesting in Large Project Fund funds from BPA. The percentage entered in this cell will calculate the Requested BPA Reimbursement – LPF in row 28. Changing this percentage will change the amount of LPF you receive from BPA. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary".
19	**Percentage of funds not requested from BPA**	**Calculated.** The percentage of the total available BPA reimbursement that you will not request from BPA is calculated. If self-funding, this may equal the self-funding percentage. However, self funding savings may be adjusted based on the expected total payment to end user.
22	**Dollar amount BPA Reimbursement requested in EEI**	**If selected No in row 12,** enter the dollar amount of the total available BPA reimbursement that you plan to request from your EEI budget. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary."
23	**Dollar amount BPA Reimbursement requested in LPF**	**If selected Yes in row 9 and No in row 12,** Enter the dollar amount of the total BPA reimbursement that you have to requested from the Large Project Fund. You may wish to complete this percentage after completing the "Measure Input" sheet and reviewing the "Project Summary."
24	**Dollar amount of funds not requested from BPA**	**Calculated.** The dollar amount of the total available BPA reimbursement that you will not request from BPA is calculated. If self-funding, this may equal the self-funding amount. However, self funding savings may be adjusted based on the expected total payment to end user.
27	**Requested BPA Reimbursement – EEI ($)**	**Calculated.** The dollar amount of the total requested EEI, based on inputs in rows 17 or 22.
30	**Requested BPA Reimbursement – LPF ($)**	**Calculated.** The dollar amount of the total requested LPF, based on inputs in rows 18 or 23.
24	**Expected Total Payment to end user**	**Required for all projects when you request a reimbursement amount from BPA that is less than the maximum BPA reimbursement. Check cell F30 to determine if it is required.** Enter total anticipated payment to the end user. You may wish to complete this after completing the "Measure Input" sheet and reviewing the "Project Summary."
31	**Reimbursement already paid through progress payments (EEI)**	If the project received progress payments, enter the dollar amount of reimbursement received in progress payments.

Row	Field	Definition
32	**Adjusted BPA Reimbursement – EEI ($)**	**Calculated:** The adjusted BPA reimbursement which adjusts requested EEI based on paid progress payments or end-user payments. Equal to the Requested BPA Reimbursement – EEI (D27) minus the Reimbursements already paid through progress payments (D35).
34	**Final Requested BPA Reimbursement (EEI + LPF)**	**Calculated:** The final requested BPA Reimbursement from both EEI and LPF. Equal to the sum of the Requested BPA Reimbursement – EEI (D27) and the Adjusted BPA Reimbursement – LPF (D28).
36	**Utility End user payment rules (for utility use – optional)**	**Optional field.** Available for use if you would like to note internal utility rules used to calculate end user reimbursement. For example, 50% of project cost, $0.15/kWh.
36	**Adjusted BPA Reimbursement – EEI ($)**	**Calculated:** The adjusted BPA reimbursement which adjusts requested EEI based on paid progress payments or end-user payments. For Industrial projects, equal to the lesser of the Total Payment to End User (D34) or the Requested BPA Reimbursement – EEI (D32) minus the Reimbursements already paid through progress payments (D35). For non-Industrial project, equal to the Requested BPA Reimbursement – EEI (D32) minus the Reimbursements already paid through progress payments (D35).
Completion Report Savings Allocation		
40	**Total Project kWh**	**Calculated:** Total project kWh savings at the busbar, calculated based on data in Measure Input tab.
41	**EEI Allocated kWh**	Total kWh allocated to EEI. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
42	**LPF Allocated kWh**	Total kWh allocated to LPF. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
43	**Self-funding Allocated kWh**	Total kWh allocated to self-funding. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
44	**Self-funding Allocated kWh (%)**	Percent of total kWh allocated to self-funding. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
Installed Project Description		
49-59	**Describe the existing system (Baseline)**	Auto-fills from “Proposed Project Description – Describe the Existing System” in Proposal. Can be overwritten for changes.
63-75	**Describe the installed system.**	Include detailed description of completed project including, equipment installed and modifications to the project from the project description in the accepted proposal.

Row	Field	Description
M&V and Energy Savings Calculation		
79	**Was M&V Plan completed in the proposal?**	**Calculated.** Will populate with "Yes" if the proposal was approved by a COTR.
81	**Select M&V Protocol utilized**	Drop down list: select the M&V protocol used in the project. See link in row 82 to reference complete M&V protocols.
84-95	**Describe the Measurement & Verification Plan**	**If the M&V plan was not approved in a Proposal.** If multiple M&V plans will be used for different measures, include all plans here or attach additional plans. Describe the Measurement and Verification performed. In the description, please include the following information: - Baseline conditions: current practice or pre condition? -Pre metering: whole building, affected end use, or none? -Post metering: whole building, affected end use, or none? -Model type: engineering, regression, or indexing? Include a detailed plan for how the energy consumption was measured at an average system output within a specified time period (e.g., 1 week) and extrapolate to an annual basis. If the energy consumption varies by more than 10 percent from month to month, sufficient measurements must be taken to document the differences. If applicable, include a one-line diagram showing metering locations both before and after the installation. Include a brief description of the instrumentation to used, the calibration procedure, and the measurement duration and/or data sampling intervals. Also include details on who performed verification and when it was performed, including a detailed metering schedule. If measurement is not possible, a detailed explanation justifying request for variance from this requirement is required. In addition, include a proposed factor, if required, for changes in production, weather, occupancy, or other factors which affect the actual energy savings. Refer to the "BPA M&V Protocol Selection Guide" and BPA M&V Protocols in the Implementation Manual Document Library. If attaching files with additional information, please provide a brief summary of the contents and include the full file name.
98-109	**Provide a description of changes to M&V Plan or Energy Savings Calculations**	**If an M&V plan was approved in a Proposal.** Include description of changes to M&V plan or energy savings calculation. Enter "No changes" if none occurred.
Actual Project Costs Verification		
113-125	**Provide summary of total project cost.**	Enter summary of actual project costs. Submit all supporting documentation to COTR with Custom Project Calculator. If attaching files, please include full file name.

Row	Field	Description
Reimbursement Payment Table		
137-149	**Reimbursement table**	**Calculated:** pulls in data from the Project Summary tab to summarize requested reimbursement.
Eligibility Criteria Checklist		
156	**1. This project does not result in fuel switching.**	Yes or No: Answer must be "Yes" to be eligible for reimbursement.
157	**2. The measures are designed to result in improvements in the efficiency of electricity generation, distribution or use.**	**Calculated.** Will populate "Yes" if the project has energy savings. Answer must be "Yes" to be eligible for reimbursement.
158	**3. The expected life of the energy savings for each measure is greater than one year.**	Yes or No: Answer must be "Yes" to be eligible for reimbursement. Refer to Column AU in "Measure Input" tab to verify measure life.
159	**4. The baseline for each measure is documented and provides a basis for establishing energy savings.**	**Calculated.** Will populate "Yes" if baseline information is entered in rows 49-59 or in proposal. Answer must be "Yes" to be eligible for reimbursement.
160	**5. The project includes a metering and verification plan showing how energy savings will be verified.**	**Calculated.** Will populate "Yes" if M&V plan information is entered in rows 105-116 or in proposal. Answer must be "Yes" to be eligible for reimbursement.
161	**6. The actual project benefit/cost ratio meets the current BPA minimum requirement.**	**Calculated.** Will populate "Yes" if project meets defined B/C ratio requirements.
167 - 224	**BPA Approval**	Do not enter information here. BPA Approval section for BPA use only. BPA Project ID will be assigned by the BPA reporting system.

Project Summary Tab: Definitions

All values in the Project Summary Tab are calculated based in inputs in the Proposal, Measure Input, and Completion Report tabs. The Project Summary Tab also includes an Errors section that will populate with error messages. If no Proposal was submitted, column B cells will remain blank

Row	Field	Project Proposal Definition	Completion Report Definition
6	**Total Project Savings - Site (kWh)**	Sum of estimated savings for all measures ("Measure Input" column F).	Sum of actual savings for all measures ("Measure Input" column G).
7	**Total Project Savings - Busbar (kWh)**	Sum of estimated busbar savings for all measures ("Measure Input" column Q).	Sum of actual busbar savings for all measures ("Measure Input" column AE).
8	**Percentage EEI Funding**	Percentage EEI requested at Proposal stage (calculated from Proposal inputs).	Percentage EEI requested at Completion Report (calculated from Completion Report inputs).
9	**Percentage LPF Funding**	Percentage LPF funds requested at Proposal stage (calculated from Proposal inputs).	Percentage LPF funds requested at Completion Report (calculated from Completion Report inputs).
10	**Percentage of Funds Not Requested from BPA**	Percentage of the total potential available BPA reimbursement not requested from BPA at Proposal stage (calculated from Proposal inputs).	Percentage of the total potential available BPA reimbursement not requested from BPA at Completion Report (calculated from Completion Report inputs).
11	**Requested BPA Reimbursement – EEI ($)**	The dollar value of the EEI funds requested from BPA, equal to Total Available BPA Reimbursement (B26) multiplied by the Percentage BPA Reimbursement Requested from EEI (B8).	The dollar value of the EEI requested from BPA, equal to Total Available BPA Reimbursement (C26) multiplied by the Percentage BPA Reimbursement Requested from EEI (C8).
12	**Requested BPA Reimbursement – LPF ($)**	The dollar value of the EEI requested from BPA, equal to Total Available BPA Reimbursement (B26) multiplied by the Percentage BPA Reimbursement Requested from EEI (B9).	The dollar value of the EEI requested from BPA, equal to Total Available BPA Reimbursement (C26) multiplied by the Percentage BPA Reimbursement Requested from LPF (C9).
13	**Funds Not Requested from BPA($)**	The dollar value of the funds not requested from BPA, equal to Total Available BPA Reimbursement (B26) minus the Requested BPA Reimbursement – EEI (B11) and the Requested BPA Reimbursement – LPF (B12).	The dollar value of the funds not requested from BPA, equal to Total Available BPA Reimbursement (C26) minus the Requested BPA Reimbursement – EEI (C11) and the Requested BPA Reimbursement – LPF (C12).
14	**EEI Allocated kWh**	Total kWh allocated to EEI at Proposal. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.	Total kWh allocated to EEI at Completion Report. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.

Row	Field	Project Proposal Definition	Completion Report Definition
15	**LPF Allocated kWh**	Total kWh allocated to LPF at Proposal. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.	Total kWh allocated to LPF at Completion Report. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
16	**Self-Funding Allocated kWh**	Total kWh allocated to self-funding at Proposal. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.	Total kWh allocated to self-funding at Completion Report. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
17	**Self-funding Allocated kWh (%)**	Percent of total kWh allocated to self-funding at Proposal. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.	Percent of total kWh allocated to self-funding at Completion Report. Refer to Funding Sources and Savings Allocation in the Implementation Manual for the calculation methodology.
18	**Total Present Value of Benefits**	Sum of the estimated total present value of benefits for all measures ("Measure Input" column U). Equal to the sum of estimated present value of energy savings, estimated value of non-energy benefits, and negative estimated present value of O&M change if O&M change is less than 0 ("Measure Input" column R+S-T, if T<0).	Sum of the total present value of benefits ("Measure Input" column AI). Equal to the sum of present value of energy savings, value of non-energy benefits, and negative present value of O&M change if O&M change is less than 0 ("Measure Input" column AF+AG-AH, if AH<0).
19	**Sum of Project Costs**	Sum of estimated cost for all measures ("Measure Input" column D).	Sum of actual cost for all measures ("Measure Input" column E).
20	**Sum of Total Costs**	Sum of estimated cost of all measures and the estimated present value of O&M change if O&M change is greater than 0 ("Measure Input" column D+T, if T>0).	Sum of actual cost of all measures and the actual present value of O&M change if O&M change is greater than 0 ("Measure Input" column E+AH, if AH>0).
21	**Project B/C Ratio**	Estimated project total resource benefit cost (TRC) ratio. Equal to the total estimated present value of benefits divided by the sum of estimated total costs ("Project Summary" cell B18/B20).	Actual project Total Resource benefit cost (TRC) ratio. Equal to the total present value of benefits divided by the sum of total costs ("Project Summary" cell C18/C20).

Row	Field	Project Proposal Definition	Completion Report Definition
23	**Estimated Simple Payback (Years)**	Estimated payback in years. Equal to the sum of estimated total costs divided by the estimated savings times the retail rate ("Project Summary" cell B20/B6*"Project Information" D33).	Estimated payback in years. Equal to the sum of total costs divided by (savings times the retail rate) ("Project Summary" cell B20/B6*"Project Information" D33).
24	**Project Cost Cap**	The estimated project cost cap per the Implementation Manual. "Project Summary"B19*70%	The actual project cost cap per the Implementation Manual. "Project Summary"C19*70%
25	**Sum of Measure-Level Reimbursement**	The sum of the total estimated potential BPA reimbursement for all measures before the cost cap is applied. Calculated based on the BPA reimbursement rate ("Measure Input" column P)	The sum of the total potential BPA reimbursement for all measures before the cost cap is applied Calculated based on the BPA reimbursement rate ("Measure Input" column AD)
26	**Total Available BPA Reimbursement**	The total available BPA reimbursement. Equal to the lesser of the project cost cap (cell B24) or sum of measure level reimbursement (cell B25).	The total available BPA reimbursement. Equal to the lesser of the project cost cap (cell C24) or sum of measure level reimbursement (cell C25).
27	**Payment to End User**	Total payment to end -user ("Proposal" D24)	Total payment to end -user ("Completion Report" D30)
28	**Reimbursement already paid through progress payments**	Not applicable	Total amount already paid in progress payments ("Completion Report" cell D31)
29	**Final Requested BPA Reimbursement**	The final requested BPA Reimbursement from both EEI and LPF. Equal to the Requested EEI $ (cell B11) and Requested LPF $ (cell B12).	The final requested BPA Reimbursement from both EEI and LPF. Equal to the Requested EEI $ (cell C11) and Requested LPF $ (cell C12))