



**Energy Efficiency**  
**Utility Quickstart Guide**  
**FY 2022-2023**



# Table of Contents

<b>Introduction</b>	<b>1</b>
<b>People You Should Know</b>	<b>2</b>
BPA staff	2
Third-party implementer staff	3
Regional EE organizations	3
<b>The Big 3.</b>	<b>5</b>
What is the energy conservation agreement?	5
What is the Implementation Manual?	5
What is BEETS and what does it do?	5
<b>Getting Started</b>	<b>6</b>
How do I decide what to offer first to begin quickly?	6
The rebate process	6
What are the various program sectors and how do I work with each?	7
What is the difference between UES Measures and Custom Projects?	7
What is self-funding?	7
What is non-reportable?	7
<b>Projects</b>	<b>8</b>
How do UES and custom projects differ?	8
Custom Projects	8
Custom Project Steps	9
<b>Budget and Payments</b>	<b>10</b>
What is BEETS	10
How do I report EE activity in BEETS?	10
What is an EEI budget?	10
How is my EEI budget calculated?	10
Where can I find my EEI budget?	10
What responsibility do I have for my EEI budget?	11
When are new EEI budgets issued?	11
What if I use all of the EE budget?	11
What if I can't spend all of my EEI budget?	11
How do I get incentive payments from BPA?	11
How do I get performance payments from BPA?	11
<b>Resources and Tools</b>	<b>12</b>
What Energy Efficiency marketing resources are on the BPA website?	12
How can I get help customizing materials for my utility?	12
What Market Research reports are available to me?	13
<b>Gatherings</b>	<b>14</b>
What is the purpose of a BPA Webinar?	14
What is expected during a roundtable?	14
What is Efficiency Exchange and how should I prepare to attend?	14
Seven tips to ensure you get the most from Efficiency Exchange	15
How can I join a workgroup for an initiative that is important to my utility?	16
<b>Utility Territories Maps</b>	<b>17</b>
<b>Terms and Acronyms</b>	<b>18</b>
<b>Important Links</b>	<b>19</b>
<b>UES Measure Summary Tables</b>	<b>20</b>

## Introduction

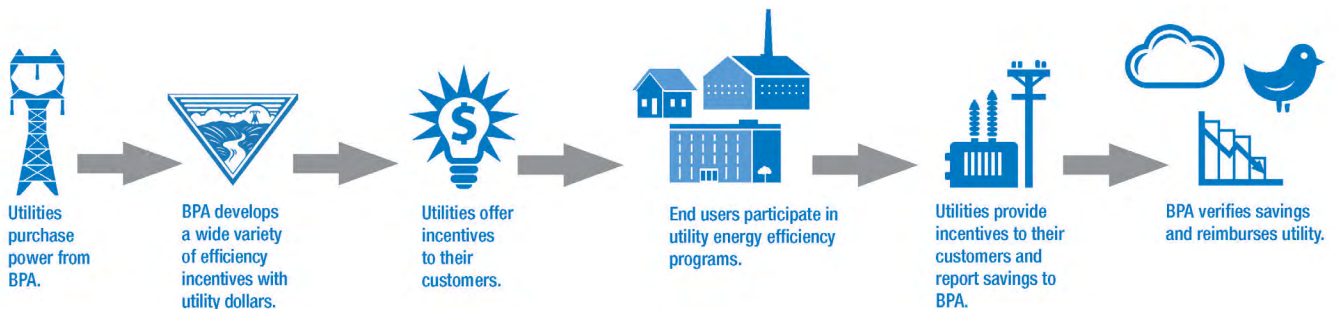
Bonneville Power Administration (BPA) and its public power utility customers are leaders in promoting energy efficiency in the Pacific Northwest. In accordance with the Pacific Northwest Electric Power Planning and Conservation Act of 1980, BPA acquires and encourages the development of energy conservation to maximize the in value of the Federal Columbia River Power System, reducing the agency’s need to acquire other resources to supply firm power to its customers.

Since the early 1980’s, working in partnership with its customers BPA has acquired more than 2,500 average megawatts of energy savings to help meet the agency’s power resource needs.

This quickstart guide was created for utility staff who may be new to working with BPA’s Energy Efficiency programs. The guide includes information and links to resources for common tasks and activities, and responses to potential questions that may arise with staff.

For any additional questions about BPA’s Energy Efficiency program, budgets, systems and policies, please contact your Energy Efficiency Representative (EER).

# How BPA and its customers acquire energy efficiency.



# People You Should Know

## BPA STAFF: UTILITY CUSTOMER SERVICE TEAM

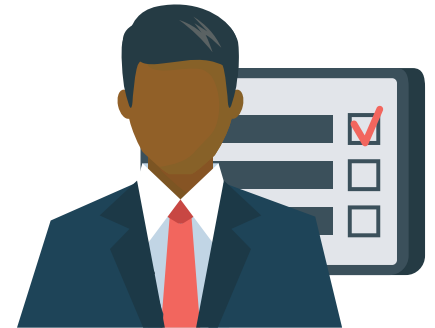
### ENERGY EFFICIENCY REPRESENTATIVE (EER)

- **Roles and responsibilities:** EERs are accountable for building and maintaining customer relationships with utility energy efficiency (EE) staff. They act as the key means to support EE’s communication with utilities. EERs lead the Customer Service Team—composed of the EER, field engineer, and the contracting officer’s technical representative—for each utility. EERs work with all BPA staff to provide coordination and execution of communication with utilities.
- **How do we work together?** Your EER should be your first point of contact for any questions, comments, or concerns about BPA’s EE programs. If your EER doesn’t know the answer, they will find it and get back to you, or put you in touch with the right person.



### CONTRACTING OFFICER’S TECHNICAL REPRESENTATIVE (COTR)

- **Roles and responsibilities:** COTRs are accountable for the review and validation of customer reporting, and payment and oversight of customer energy-efficiency activities. COTRs work with utilities on the review and approval of invoices submitted to ensure compliance with BPA’s contractual rules, and to answer a utility’s questions regarding BPA’s rules, invoices, and payment.
- **How do we work together?** Utilities should contact a COTR about invoices they submit and questions of compliance with BPA’s Implementation Manual (IM) rules. COTRs also assist utilities with interpretation of rules and policies of the IM.



### ENERGY EFFICIENCY FIELD ENGINEERS

- **Roles and responsibilities:** EE Field Engineers are accountable for technical support and associated communication necessary to ensure utilities can effectively implement and conduct a Measurement and Verification Plan (M&V) on complex and custom EE projects in their service territories.
- **How do we work together?** If needed, utilities can work with their assigned EE Field Engineer to identify, plan, and support complex efficiency projects. EE Field Engineers often partner with utilities to work directly with end users to facilitate large-scale technical projects. They can also make hands-on site visits and provide remote implementation support for utilities and end users. EE Field Engineers can also help with entering data into the BPA calculators.



### PROGRAMS TEAM

- **Roles and responsibilities:** The Programs Team is responsible for the development of EE programs to meet efficiency acquisition goals in a way that serves the needs of BPA’s utilities and their end users.
- **How do we work together?** The Programs Team provides detailed and program-specific guidance to BPA and utility staff. Utilities will often be connected directly to a Programs Team member for help with detailed questions about BPA’s programs or efficiency applications that are out of the norm. Your EER will connect you with the appropriate Programs Team member if necessary.



## MARKETING TEAM

- **Roles and responsibilities:** The Marketing Team is responsible for the development of EE promotional materials and communications for BPA's EE program and support for customer utilities. They also work in partnership with NEEA to plan and execute the annual Efficiency Exchange conference.
- **How do we work together?** The Marketing Team responds to utility requests for marketing assistance. This includes graphic design for logos and icons, production design for custom print and web materials, copywriting/editing, presentations, instructional videos, web design and marketing strategy and planning. If you need marketing assistance in designing or customizing marketing materials and messaging or consulting on your marketing projects, your EER will connect you with the appropriate Marketing Team member.



## THIRD-PARTY IMPLEMENTERS

The following third parties are implementers hired by BPA. They represent BPA programs and help utilities achieve energy efficiency in their service territories:

### ENERGY SMART INDUSTRIAL PARTNER (ESIP)

- **Roles and responsibilities:** ESIPs work directly with utilities to identify and support the implementation of efficiency at industrial facilities. ESIPs possess highly technical industrial engineering knowledge and can support efficiency in complex industrial environments.
- **How do we work together?** Utilities decide how they prefer to work with the ESIP and the communication protocol they want to establish with their industrial customers. An individual utility may either contact their customer directly or through their ESIP. EERs have an important role in these relationships, working in partnership with utilities and the ESIP to help coordinate the EEI budget.



### TRADE ALLY NETWORK (TAN)

- **Roles and responsibilities:** BPA's trade ally network is an organization that works with the contractor community to support the implementation of efficient commercial lighting and HVAC systems. This organization trains participating contractors on best practices for efficient installation, how to use efficiency to create competitive advantage, and how to work with utility programs to offer incentives to their customers.
- **How do we work together?** You can call on BPA's trade ally network to train and support your contractor community, and help identify and scope efficiency opportunities in commercial lighting and HVAC. You should reach out to this group either directly at [tradeallynetworknw@evergreen-efficiency.com](mailto:tradeallynetworknw@evergreen-efficiency.com) or work with your EER to facilitate their engagement.



## REGIONAL ORGANIZATIONS

### NORTHWEST POWER AND CONSERVATION COUNCIL

The Council was created by the Pacific Northwest Electric Power Planning and Conservation Act of 1980 to develop and maintain a regional power plan and a fish and wildlife program to balance the Northwest's environmental and energy needs. The Council sets the regional energy-efficiency target through power plans and calculates total resource cost, which is used to determine measure cost effectiveness.



## REGIONAL TECHNICAL FORUM (RTF)

The RTF is a volunteer organization formed by the Council in 1999 that determines measure cost and energy savings and specifications for a limited set of energy-efficiency measures. RTF creates unit energy savings (UES) by verifying the savings estimates of commonly used measures. It also produces standard protocols for measures with variable savings, and guidelines for evaluating savings from custom measures and program-impact evaluations.



## NORTHWEST ENERGY EFFICIENCY ALLIANCE (NEEA)

NEEA is a nonprofit organization that works to increase energy efficiency to meet the region's future energy needs. NEEA works in collaboration with BPA, Energy Trust of Oregon, and Northwest public- and investor-owned utilities on behalf of energy consumers to accelerate the innovation and adoption of energy-efficient products, services, and practices. NEEA also leverages the region's market power within the commercial, industrial, and residential sectors to remove barriers to adoption of energy-efficiency measures.



## WHAT IS THE PROTOCOL TO CONTACT A PROGRAM MANAGER OR OTHER BPA SPECIALIST?

Utility staff should communicate primarily through their EER. EERs hold ultimate accountability for building and maintaining relationships and act as the key means to support communications between BPA's EE program and its utilities.

It is also the EERs responsibility to work to ensure the customer viewpoint is considered throughout BPA's energy-efficiency department, especially with any activities or offerings that have an impact on utilities.



## The Big 3

### WHAT IS THE ENERGY CONSERVATION AGREEMENT?

An Energy Conservation Agreement (ECA) is a signed contractual agreement between a utility and BPA for the acquisition of energy savings. The requirements for implementing and reporting energy efficiency activities are incorporated by reference from the [Implementation Manual](#) (IM).

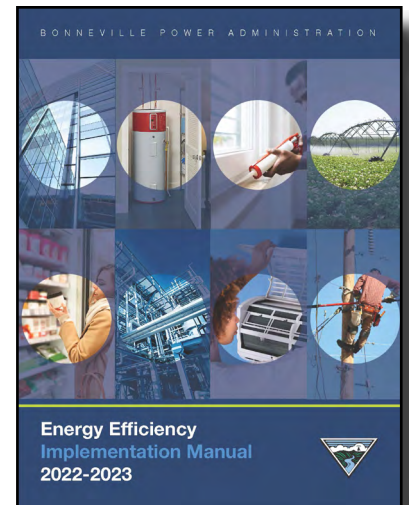
### WHAT IS THE IMPLEMENTATION MANUAL?

The Implementation Manual (IM) should be the first place you go to learn about BPA's energy efficiency programs. The IM describes the requirements that BPA's public and federal utility customers must meet to receive incentive payments and savings credits for EE accomplishments. It is published once a rate period (every two years) and updated every six months. You can find the most current version of the IM online on the BPA [website](#).

The first three sections are administrative in nature (Introduction, BPA Funding, and General Requirements), the next two sections cover how to create a custom project (implementing efficiency projects at a single location) and custom program (when a utility wants to design and offer a new measure to multiple endusers). The last six sections highlight each sector and the measures available for each. Each section lists the requirements and payment information. The appendices is important as it notes all upcoming changes announced six-months in advance.

### WHAT IS BEETS AND WHAT DOES IT DO?

The [BPA Energy Efficiency Tracking System](#) (BEETS) is BPA's energy-efficiency invoicing and reporting system. Utilities use BEETS to report EEI funded, self-funded, and non-reportable energy efficiency activities. There are specific reporting requirements for Unit of Energy Savings (UES) measures, nonresidential lighting and custom projects. For more information, refer to the IM and the [BEETS Navigation Guide](#), both found on the BPA [website](#).



## Getting Started

### HOW DO I DECIDE WHAT TO OFFER FIRST TO BEGIN QUICKLY?

Your utilities' energy efficiency incentive (EEI) budget, the type of customers served and utility staffing levels for energy efficiency are significant considerations when deciding which programs or measures to offer.

A larger budget may open a wide range of program options whereas a smaller budget might limit incentives offered to end users. Some utilities hire third-party contractors to manage their programs, while others minimize what they offer and focus on a few large projects for the entire rate period.

If your customer base is mostly residential, the Residential section of the Implementation Manual has many stand-alone UES measures, as well as packaged turnkey measures.

Commercial end users can access UES measures, custom projects and energy management. Nonresidential lighting could be a great opportunity in the commercial sector, and the support of the Northwest Trade Ally Network is available to you.

If you have industrial customers, Energy Smart Industrial (ESI) can assist you by providing outreach and working with your industrial endusers which are interested in taking advantage of available program opportunities. Industrial opportunities that your ESIP can assist with include custom projects, nonresidential lighting, UES measures or energy management.

There is BPA support for agricultural and utility distribution system measures. Browse the IM and contact your EER for additional assistance in determining the best options for your utility.

### THE REBATE PROCESS

Each utility decides which IM rebate measures they will offer to their end users, and how much incentive they want to provide their end users.

When the requirements in the Implementation Manual have been met for a measure/project, a utility may submit the completed measure/project into BEETS for review by BPA.

Once the measure/project has been approved by a COTR, the utility may submit an invoice request within BEETS for a rebate payment.

After the invoice request is approved in BEETS by a COTR, it will process overnight into the BPA accounting system, and payment will be made to the utility within ten days.

Once a payment approval has processed overnight, an earned performance payment is calculated into the "earned performance payment" budget category for all kWh savings that received a rebate. It is at the utility's discretion whether and when they choose to invoice BPA for performance payments.





## WHAT ARE THE VARIOUS PROGRAM SECTORS AND HOW DO I WORK WITH EACH?

BPA's Energy Efficiency program is organized around seven sectors, each having specific energy-use patterns and energy-efficiency opportunities. View the current edition of BPA's [Energy Efficiency Implementation Manual](#) (IM) for official definitions of each sector. The sectors are:

- Residential: Single-family, multifamily, and manufactured homes
- Commercial: Businesses, institutional buildings, miscellaneous end-uses
- Industrial: Manufacturing, municipal utility services
- Agricultural: Irrigated crop and on-farm production, indoor agriculture grow, aquaculture
- Multisector: Nonresidential lighting systems, other miscellaneous end-uses
- Utility Distribution: Electric utility owned/operated equipment and facilities
- Federal: BPA direct and utility served federal agencies, Federal Columbia River Power System reserved power and BPA station service sites.

While each sector has a particular set of subject-matter experts and team members associated with it, the best way for a utility to make a connection with sector-specific staff is through their EER. This partnership helps the EER keep abreast of each utility's needs and enables them to identify other potentially helpful resources. The EER also gives BPA's other staff a single point of contact to funnel information back to an individual utility.

## WHAT IS THE DIFFERENCE BETWEEN UES MEASURES AND CUSTOM PROJECTS?

Units of Energy Saving (UES) are stand alone measures in which savings have already been predetermined on a per-unit basis (e.g., light bulb, irrigation nozzle or square feet of insulation). There is a UES measure list which provides all the Reference Numbers and their attributes (incentive, effective dates, etc.) to help utilities when selecting measures to report to BPA. Some measures require the utility to calculate savings on a separate calculator and input the values onto the reporting template prior to submitting into BEETS. Utilities can choose to claim less incentive from BPA and/or cap how much they pay to their enduser.

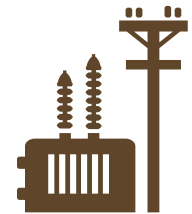
Custom projects have the savings calculated for the specific efficient equipment being installed. Custom projects need to have a baseline of past energy use, a proposal of what the end-use customer will be installing, and a way to measure the energy use after the project has been installed (M&V). BPA pays custom projects the lesser of 70 percent of the incremental project cost or the cents per kWh in the payment chart in the IM. Utilities can choose to cap how much incentive they receive from BPA and/or how much they pay to their enduser.

## WHAT IS SELF-FUNDING?

Self-funding is when a utility submits completed activity into BEETS that are run through BPA's programs but does not seek a payment from BPA for all or a portion of the available payment. Some utilities have the approval from their board or council to self-fund energy efficiency in addition to using their EEI budget. All self funded conservation should be reported to BPA to ensure it is accounted for and applied towards regional conservation achievements.

## WHAT IS NON-REPORTABLE?

Non-reportable activity is when a utility wants to officially record savings that were completed but did not receive BPA approval. Most of the time this is done by utilities that want the savings to count toward their state requirements (i.e., WA I-937).



## Projects

### HOW DO UES AND CUSTOM PROJECTS DIFFER?

UES are measures in which savings are estimated on a per-unit basis (e.g., savings per light bulb, square foot or volume) for a typical baseline case to an efficient case scenario. These measures have relatively small variation in savings that can be reliably forecast (formerly known as a deemed measure). UES measures can be either RTF- or BPA-qualified measures, and are reported to BPA by uploading an invoice to the most current version of the UES measures upload template. UES measures can be either EEI funded or utility self-funded.








### CUSTOM PROJECTS

All sectors can have custom projects; site-specific calculations determine the savings. Projects are paid the lesser of 70 percent of incremental project cost and the incentive calculated based on the type and sector of the project. Utilities can choose to cap project cost at less than 70 percent or pass through less than the BPA reimbursement.

Custom projects need to have a baseline of past energy use, a proposal of what the end-use customer will do, and an M&V plan for the post-project energy use.

Utilities can work with their BPA Customer Service Engineer or Energy Smart Industrial Partner (ESIP) to complete a custom project. Option 1 utilities must submit a Completion Report to BPA in BEETS. The report must include all completed documents: project information, energy savings calculations including any changes to the M&V plan, documentation of reported non-energy benefits, project costs documentation, and any additional documentation required for project verification. Option 2 utilities will submit custom projects in bulk via the C2 bulk upload template.

# CUSTOM PROJECT STEPS

PROJECT STEPS	 Utility	 Business Owner or Facility Manager	 Trade Ally Network Specialists supported by BPA	 BPA Engineer (Custom or Complex Projects)	 Contractors, Distributors, Manufacturers
STEP ONE: PROJECT IDENTIFICATION	<ul style="list-style-type: none"> <li>Identifies potential project with customer or Trade Ally.</li> </ul>	<ul style="list-style-type: none"> <li>Shows interest in potential project.</li> <li>Contacts local utility, Trade Ally Network, or Trade Ally.</li> </ul>	<ul style="list-style-type: none"> <li>Assists Trade Allies and utilities with identifying available HVAC incentives.</li> <li>Upon request, conducts an initial site visit to identify savings potential.</li> <li>Upon request, recommends technology or products.</li> </ul>	<ul style="list-style-type: none"> <li>If its a custom or complex project, is involved from the design phase and works with the trade ally and owner to confirm energy savings opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>Identifies potential project with customer.</li> <li>Contacts local utility or Trade Ally Network for available incentives, or uses the search tool on the Trade Ally Network website.</li> </ul>
STEP TWO: PROJECT SCOPING	<ul style="list-style-type: none"> <li>Ensures any required pre-project paperwork is complete.</li> <li>If required, pre-approves custom project proposals.</li> </ul>	<ul style="list-style-type: none"> <li>Participates in initial project scoping activities.</li> <li>Reviews Trade Ally's proposal.</li> </ul>	<ul style="list-style-type: none"> <li>Ensures owner and Trade Ally both understand the project specifications.</li> <li>Confirms with the local utility any additional incentive requirements.</li> <li>When project is ready to proceed, engages the local utility to confirm proper paperwork is in place.</li> </ul>	<ul style="list-style-type: none"> <li>If custom project, works with the Trade Ally to conduct an initial assessment to scope energy savings potential.</li> <li>As necessary, works with Trade Ally and utility to create a custom project proposal in BEETS</li> </ul>	<ul style="list-style-type: none"> <li>Provides project cost estimate to business owner.</li> <li>If its a custom project, works with BPA Engineer and Trade Ally Network to identify all potential energy upgrades.</li> </ul>
STEP THREE: PROJECT INSTALLATION	<ul style="list-style-type: none"> <li>Not responsible for project management or job oversight.</li> </ul>	<ul style="list-style-type: none"> <li>If required, signs agreements with Trade Ally.</li> </ul>	<ul style="list-style-type: none"> <li>Is available to answer questions about incentive requirements.</li> <li>Not responsible for project management or job oversight.</li> </ul>	<ul style="list-style-type: none"> <li>Available to answer questions about incentive requirements and provides technical support during project installation.</li> <li>Not responsible for project management or job oversight.</li> </ul>	<ul style="list-style-type: none"> <li>Proceeds with project installation and continues to work with the local utility, Trade Ally Network, or BPA Engineers as appropriate.</li> </ul>
STEP FOUR: PROJECT CLOSEOUT	<ul style="list-style-type: none"> <li>Completes or oversees any required post-installation inspections.</li> </ul>	<ul style="list-style-type: none"> <li>If required, signs off on completed project.</li> </ul>	<ul style="list-style-type: none"> <li>Upon request, helps ensure accurate completion of incentive paperwork prior to submittal to local utility.</li> </ul>	<ul style="list-style-type: none"> <li>Works with Trade Allies and local utility to prepare a project completion report in BEETS.</li> <li>Verifies energy savings.</li> </ul>	<ul style="list-style-type: none"> <li>Completes all work, including commissioning; confirms project meets incentive requirements.</li> <li>If custom project, works with BPA engineer to prepare a project completion report in BEETS.</li> </ul>
STEP FIVE: INCENTIVE PROCESSING	<ul style="list-style-type: none"> <li>Processes incentive payment (estimated 6-8 weeks).</li> </ul>	<ul style="list-style-type: none"> <li>Receives incentive payment within estimated 6-8 weeks.</li> </ul>	<ul style="list-style-type: none"> <li>Helps ensure utility has complete paperwork for incentive processing.</li> </ul>	<ul style="list-style-type: none"> <li>Submits final report to local utility. Payment is made after the completion report is reviewed and accepted and utility requests payment from BPA.</li> </ul>	<ul style="list-style-type: none"> <li>Provides local utility with required final documentation, including Project Information Form and any installation invoices.</li> </ul>

# Budget and Payments

## WHAT IS BEETS?

The BPA Energy Efficiency Tracking System (BEETS) is BPA's new energy-efficiency invoicing and reporting system that enables BPA and its Utility Customers to efficiently use a centralized system to submit, manage, track and report energy conservation acquisitions.

BEETS was released in fall 2022 and provides:

- Automated workflows and data verification checks to help expedite processing;
- Self-service, on demand reporting for customers;
- Visual dashboards with visibility into application progress, budget and payments;
- Ability to invoice at utility's convenience; and
- Centralized data across application submittal, invoicing, and performance payments.

## HOW DO I REPORT EE ACTIVITY IN BEETS?

UES measures are stand alone rebates that are reported by entering them onto a UES Bulk Upload Template and uploading the file into BEETS.

Lighting equipment that is upgraded in nonresidential locations is reported by populating the data into a Non-Residential Lighting Calculator and uploading the file into BEETS.

Custom Projects, Energy Project Manager, Strategic Energy Management, Reconductor & Transformer Upgrades and Small Compressed Air are all entered directly into BEETS.

## WHAT IS AN EEI BUDGET

Energy Efficiency Incentive (EEI) budgets are established by BPA, per the Energy Conservation Agreement (ECA), to purchase energy savings from utilities, and pay a performance payment for qualifying savings. Incentives and performance payments are paid from separate budget categories allocated by each utility.

## HOW IS MY EEI BUDGET CALCULATED?

Utility EEI budgets are based on a formula that calculates each utility's share of the regional EEI budget based on the amount of Tier One power they purchased from BPA in a previous time period.

## WHERE CAN I FIND MY EEI BUDGET?

You can view your utility's EEI budget and expenditures in BEETS. If you have questions about your EEI budget, you can also ask your EER or COTR.



## WHAT RESPONSIBILITY DO I HAVE FOR MY EEI BUDGET?

In order for rebate or performance payments to be processed and paid to a utility, sufficient funds must be available in the appropriate budget. In addition, performance payments are capped. Each utility is responsible for monitoring the levels of their two budgets within BEETS; (1) EEI for rebates and (2) Performance Payments, see the funding section of the [IM](#) for more information.

## WHEN ARE NEW EEI BUDGETS ISSUED?

EEI budgets are issued for a two-year rate period, which begins on October 1 of odd-numbered years (2021, 2023, 2025, etc.). The EEI budget amounts are released the month before the beginning of the rate period (September of odd-numbered years).

## WHAT IF I USE ALL OF THE EEI BUDGET?

At any time during the rate period, utilities may transfer EEI funds among each other. An implementation budget transfer, previously known as a bilateral transfer, is a transfer of EEI budget between utilities. For further information please refer to Section 2.1.2 of the IM.

## WHAT IF I CAN'T SPEND ALL OF MY EEI BUDGET?

If a utility has extra EEI budget at the end of a rate period, they can carryover some of it into the next rate period. Utilities may transfer up to 10% of their initial EEI budget or up to \$50,000 of their available implementation budget, whichever is greater. Extra residual budget beyond carryover can be transferred to another utility, sometimes with an agreement of repayment in the next rate period. This implementation budget transfer can be initiated by reaching out to your EER. Soon utilities will have the ability to initiate the transfer in BEETS.

## HOW DO I GET INCENTIVE PAYMENTS FROM BPA?

Utilities submit completed EE activity (called applications) into BEETS for approval. Once applications are approved by the BPA COTR, the utility may invoice BPA for the EEI incentives. For more information, refer to Section 3.2 of the Implementation Manual IM.

## HOW DO I GET PERFORMANCE PAYMENTS FROM BPA?

To assist utilities with the staff and material costs of running energy efficiency programs, utilities may claim performance payments that are earned from EEI funded savings (not self-funded or Non-Reportable). After the EEI funded savings are invoiced, BEETS automatically calculates earned performance payments (usually the next day), which may then be invoiced at that time if the utility chooses. The total maximum amount of performance payments a customer can earn is based on their EEI budget and whether they are Small, Rural Residential (SRR) or non-SRR. For more information please refer to Section 2.1.4 of the Implementation Manual IM.

A utility is not required to claim performance payments, they can choose to use their EEI budget to do additional projects.



# Resources and Tools

## WHAT ENERGY EFFICIENCY MARKETING RESOURCES ARE ON THE BPA WEBSITE?

BPA's marketing team helps utilities communicate with their customers about energy efficiency using various [Marketing Toolkits](#) and the self-serve [Marketing Portal](#). The toolkits contain various design files, copy libraries, and images for utilities to use to create marketing materials. Marketing Portal offers a range of easily customizable, ready-made marketing materials and an image library to help utilities communicate about the benefits of energy-efficiency products and current rebate offers.

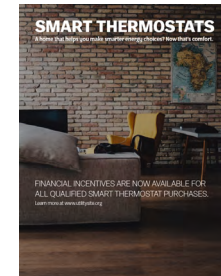
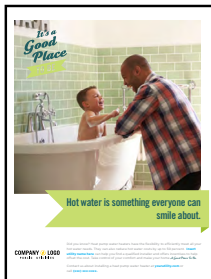


## HOW CAN I GET HELP CUSTOMIZING MATERIALS FOR MY UTILITY?

Utilities may also work directly with the marketing team to adapt portal materials to their need if they lack the capability or resources to work with the files, or if they need a level of customization beyond what the portal offers. Remember, your EER and the marketing staff are happy to help you find a solution that meets your needs. Visit [BPA.gov](http://BPA.gov) to register for the Marketing Portal, and view instructional documents and helpful videos. See samples of our template materials at the end of this section.

In addition to its own resources, BPA often participates in regional marketing efforts through the Northwest Energy Efficiency Alliance. Sign up to access NEEA's marketing newsletter and customer-facing marketing sites as well as quick access to marketing toolkits, resources and marketing calendars at <https://nea.org/portal>.

There are also additional [marketing toolkits](#) and customization assistance available through BPA's partnership with Trade Ally Network NW.

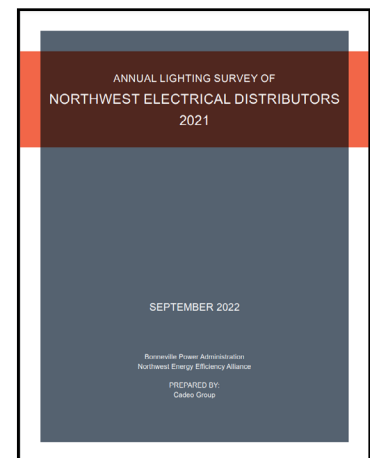
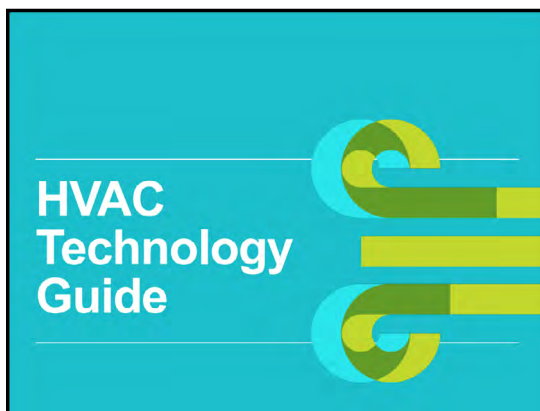
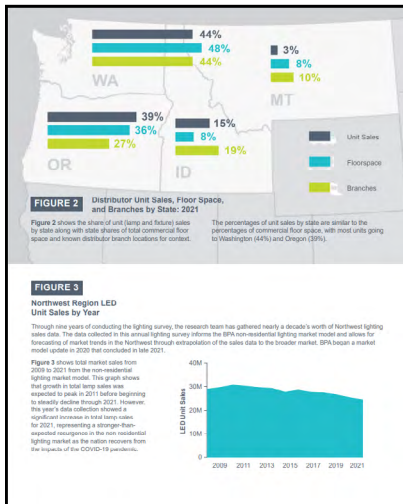


# WHAT MARKET RESEARCH REPORTS ARE AVAILABLE TO ME?

BPA performs rigorous market research and data collection to build market models that track changes over time in energy consumption, sales trends, stock turnover, energy savings, product baselines, and other market trends. Current markets include nonresidential lighting, residential and commercial HVAC, and nonresidential adjustable speed drives. This market research not only provides valuable insights on how much energy conservation is happening in different markets and how these markets are changing over time, it allows utility programs to maximize their impact and helps the region plan for future generation and capacity needs.

To access BPA's market research reports, data, analysis, and presentations visit:

<https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings>



## Gatherings

### WHAT IS THE PURPOSE OF A BPA WEBINAR?

BPA webinars are informal presentations that cover topics of interest to the energy-efficiency community. Subjects may include: new programs and measures, updated calculators, and evaluations and results.

The webinars educate, inform, and allow for collaboration between groups and sometimes expand to become more hands-on workshops.

Information about upcoming BPA webinars, topics, and participation details are announced two weeks in advance in the BPA Energy Efficiency Weekly Announcements, and through direct outreach to utilities from BPA EERs . Presentation materials are frequently posted after the webinar on Energy Efficiency's [Presentations & Webinars](#) page.



### WHAT IS EXPECTED DURING A ROUNDTABLE?

BPA's EERs work with utility staff to set up roundtable meetings across the region in late summer or early fall. Roundtables are a great opportunity for utility staff and BPA EE staff to network and share updates on their activities.

Suggestions to get the most out of roundtables:

- Before the roundtable, let your EER know the topics you'd like to discuss to help them develop the agenda and line up the appropriate EE staff to attend
- Share your ideas for organizing the roundtable or leading the discussion on a particular topic with your EER
- Don't be afraid to ask questions or offer comments to contribute to a richer conversation
- Come prepared to share updates on your programs, successes, concerns, etc. during the roundtable discussion portion of the meeting
- Network with utility and BPA staff during breaks and after hours
- After the event, give us your feedback about ways to improve the roundtable



### WHAT IS THE EFFICIENCY EXCHANGE AND HOW SHOULD I PREPARE TO ATTEND?

[The Efficiency Exchange](#) (EFX) is a collaborative effort between BPA and NEEA, and is the premier networking and learning conference for energy-efficiency professionals across the Northwest. The EFX is held annually every spring. Attendees from public and private utilities, consulting and research firms, government, and nonprofit organizations gather to learn and connect, and help the region more effectively achieve its energy-savings goals. Visit the [EFX](#) website for more details.





## SEVEN TIPS TO ENSURE YOU GET THE MOST FROM EFFICIENCY EXCHANGE:

1. Register in advance to get the early bird pricing rather than trying to register on-site
2. Make your hotel reservation early. Reservations fill up fast and if nothing is available close to the event, you may need to commute from a distant hotel. The same goes for your transportation arrangements. If you aren't staying at a host hotel, arrive early enough for a "dry run" to and from the conference site. When travel arrangements are made, remember to confirm transportation to your hotel. Many cities offer public transportation to hotel sites. Shuttles, taxis and ride share options are also available.
3. Review the agenda and plan what sessions to attend
4. Arrange meetings with organizations, panelists or utility representatives in advance, or agree to meet during meal times or receptions
5. Visit exhibitor booths to learn about new products and services
6. Sign up for EFX-sponsored tours (if offered) to visit places offsite in advance
7. Arrive early or stay later to explore the EFX host city. EFX locations are always in interesting places with historical significance and exploration opportunities.



---

## HOW CAN I JOIN A WORKGROUP FOR AN INITIATIVE THAT IS IMPORTANT TO MY UTILITY?

There are several workgroups utility staff can participate in and help make a difference in the Pacific Northwest region. Here are a few workgroups you might like to explore:

### **Utility Sounding Board (USB)**

This is a group of nine energy-efficiency staff from a diverse set of utilities that are interested in working closely with BPA managers to provide suggestions and feedback on current programs and initiatives. USB members also have the opportunity to provide ideas while previewing new programs and initiatives prior to the launch for all utilities.

### **Northwest Public Power Regional Low-Income Energy Efficiency Workgroup**

A group of utilities, Community Action Program Agencies (CAP), Community Action Agencies (CAA), and other stakeholders that work together to help residential customers in the low-income segment of our region.

### **Regional Technical Forum (RTF) and its subcommittees**

Utilities are invited to join a subcommittee that is relevant to their service area, such as Connected Thermostats, Ductless Heat Pumps, Heat Pump Water Heaters, New Homes Standard Protocol, Non-Residential Lighting, Small and Rural Utilities, and other subcommittees. Find a list of RTF subcommittees [here](#).

### **Northwest Energy Efficiency Alliance (NEEA)**

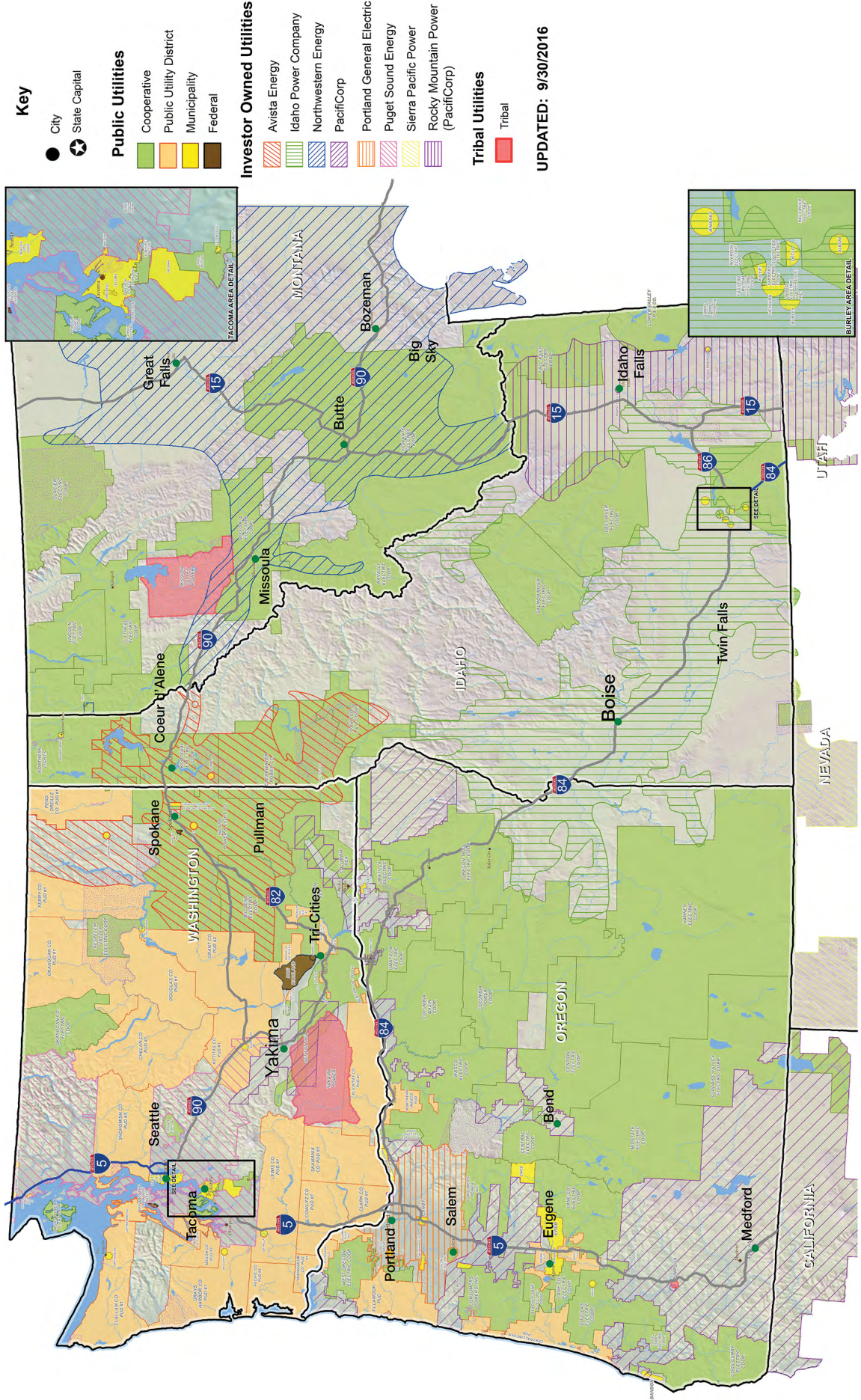
NEEA also has workgroups across many of their key initiatives and programs listed on their [webpage](#).

### **BPA sectors**

Select sectors also have [workgroups](#) that can be joined. To learn more about these and other workgroups, please contact your EER.

# Utility Territories Maps

## PACIFIC NORTHWEST PUBLIC UTILITY TERRITORIES



## Terms and Acronyms

TERM	DEFINITION
BEETS	Bonneville Energy Efficiency Tracking System
Implementation Budget Transfer	A reallocation of implementation budget funding between utilities. Formerly bilateral transfer.
BPA	Bonneville Power Administration
CAA	Community Action Agencies
CAP	Community Action Provider/Partner/Programs
COTR	Contracting Officer's Technical Representative
GPP	Custom Project Proposal Calculator
ECA	Energy Conservation Agreement
EE	Energy Efficiency
EI	Energy Efficiency Incentive
EER	Energy Efficiency Representative
EFX	Efficiency Exchange Conference
ESI	Energy Smart Industrial
IM	Implementation Manual
kWh	Kilowatt Hours
LC	Lighting Calculator
M&V	Measurement and Verification Plan
NEEA	Northwest Energy Efficiency Alliance
RTF	Regional Technical Forum
SRR	Small, Rural and Residential
UES	Unit of Energy Savings (deemed)
USB	Utility Sounding Board
VFD	Variable Frequency Drive

For a more comprehensive list of energy-efficiency terms, and acronym definitions, please refer to the BPA [Implementation Manual](#) or contact your EER.

# Important Links

PAGE	LINK
Agricultural Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/agricultural">https://www.bpa.gov/energy-and-services/efficiency/agricultural</a>
BPA EE Action Plan	<a href="https://www.bpa.gov/energy-and-services/efficiency/action-plan">https://www.bpa.gov/energy-and-services/efficiency/action-plan</a>
BPA EE Homepage	<a href="https://www.bpa.gov/energy-and-services/efficiency">https://www.bpa.gov/energy-and-services/efficiency</a>
BPA Energy Efficiency Tracking System (BEETS)	<a href="https://www.bpa.gov/energy-and-services/efficiency/bpa-energy-efficiency-tracking-system">https://www.bpa.gov/energy-and-services/efficiency/bpa-energy-efficiency-tracking-system</a>
Commercial Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/commercial">https://www.bpa.gov/energy-and-services/efficiency/commercial</a>
EE Announcements	<a href="https://www.bpa.gov/energy-and-services/efficiency/announcements">https://www.bpa.gov/energy-and-services/efficiency/announcements</a>
Efficiency Exchange	<a href="https://neea.org/get-involved/efficiency-exchange-conference">https://neea.org/get-involved/efficiency-exchange-conference</a>
Federal Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/federal">https://www.bpa.gov/energy-and-services/efficiency/federal</a>
Implementation Manual	<a href="https://www.bpa.gov/energy-and-services/efficiency/implementation-manual">https://www.bpa.gov/energy-and-services/efficiency/implementation-manual</a>
Industrial Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/industrial">https://www.bpa.gov/energy-and-services/efficiency/industrial</a>
Market Research	<a href="https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings">https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings</a>
Marketing Portal	<a href="http://marcomcentral.app.pti.com/Bonneville_Power_Administration/bpa">http://marcomcentral.app.pti.com/Bonneville_Power_Administration/bpa</a>
Marketing Resources	<a href="https://www.bpa.gov/energy-and-services/efficiency/marketing-resources">https://www.bpa.gov/energy-and-services/efficiency/marketing-resources</a>
Northwest Energy Efficiency Alliance	<a href="https://neea.org">https://neea.org</a>
Presentations and Webinars	<a href="https://www.bpa.gov/energy-and-services/efficiency/presentations-and-webinars">https://www.bpa.gov/energy-and-services/efficiency/presentations-and-webinars</a>
Residential Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/residential">https://www.bpa.gov/energy-and-services/efficiency/residential</a>
Tutorial videos	<a href="https://www.youtube.com/user/BPATraining">https://www.youtube.com/user/BPATraining</a>
Utility Distribution Sector	<a href="https://www.bpa.gov/energy-and-services/efficiency/utility-distribution">https://www.bpa.gov/energy-and-services/efficiency/utility-distribution</a>
Utility Toolkit	<a href="https://www.bpa.gov/energy-and-services/efficiency/utility-toolkit">https://www.bpa.gov/energy-and-services/efficiency/utility-toolkit</a>

# UES Measure Summary Tables

The payment levels described in this table provide a summary only. Complete details of the payment levels and associated requirements may be found in the corresponding text of the IM.

AGRICULTURAL	
PROGRAM COMPONENT OR MEASURE	PAYMENT
7.2 Freeze-Resistant Stock Water Tanks/Fountains	\$140-\$225 per tank or fountain
7.3 Thermostatically Controlled Outlets	\$14 per outlet
7.4 Thermostatically Controlled Stock Tanks	\$52 per stock tank
7.5 Transformer De-Energization	\$0.03 per kWh
<b>7.6 Irrigation Measures</b>	
7.6.1 Irrigation System Conversions: LESA/LEPA/MDI	\$14 per drop
7.6.2 Sprinkler Package Replacements	\$3-\$14 per drop
7.6.3 Irrigation System Conversions: High Pressure to Low Pressure	\$12 per drop
7.6.4 Irrigation Hardware	\$1-\$4 per measure
<b>7.7 Agricultural Pumps and VFDs</b>	
7.7.1 Irrigation Pump Testing and System Analysis	\$50-\$300 per test or analysis
7.7.2 Variable Frequency Drives for Centrifugal Agricultural Pumps (BPA-Qualified)	\$50 per horsepower
7.7.3 Variable Frequency Drives in Agricultural Turbine Pump Applications (BPA-Qualified)	\$80 per horsepower
7.7.4 Variable Frequency Drive for New Agriculture Pump Efficiency Installations (BPA-Qualified)	\$50 per horsepower (new centrifugal pump) \$80 per horsepower (new turbine pump)
7.7.5 Agricultural New Pump Efficiency Upgrade (BPA-Qualified)	\$50 per horsepower
<b>Custom Projects</b>	
7.8 New Agricultural Construction	Refer to the <a href="#">Implementation Manual</a>
7.9 Other Agricultural Measures	Refer to the <a href="#">Implementation Manual</a>
<b>Additional Multisector Opportunities</b>	
Some Industrial and Commercial Sector measures may be applicable to Agricultural projects. Measures eligible for installation in multiple sectors are identified where applicable in the body of the IM in the primary sector.	

COMMERCIAL	
PROGRAM COMPONENT OR MEASURE	PAYMENT
8.2 Commercial Custom Projects—Retrofits and New Construction	Refer to the <a href="#">Implementation Manual</a>
8.3 Nonresidential Lighting	Refer to the <a href="#">Implementation Manual</a>
<b>8.4 Commercial HVAC</b>	
8.4.1 Advanced Rooftop Unit Control (ARC)	\$100 per ton (ARC Retrofit - Lite) \$200 per ton (ARC Retrofit - Full)
8.4.2 Connected Thermostat	\$150 per connected thermostat (Initial Install) \$50 per connected thermostat (Verification)
8.4.3 Ductless Heat Pump Retrofit and Upgrade (BPA-Qualified)	\$1,000 per ton (Retrofit) \$300 per ton (Upgrade)
8.4.4 Air-Source Heat Pump Retrofit and Upgrade (BPA-Qualified)	\$1,000 per ton (Retrofit) \$150 per ton (Upgrade)
8.4.5 Variable Refrigerant Flow System Retrofit (BPA-Qualified)	\$1,000 per ton
8.4.6 Variable Frequency Drive on Air Handling Unit Fan (BPA-Qualified)	\$300 per horsepower
8.4.7 Commercial Packaged Terminal Heat Pump (BPA-Qualified)	\$600 per PTHP (Retrofit) \$100 per PTHP (New Construction)
<b>8.5 Commercial Shell Measures</b>	
8.5.1 Commercial Insulation	\$0.75-\$2.10 per square foot
8.5.2 Commercial Windows (BPA-Qualified)	\$9 per square foot of window replaced (Heating Zone 1) \$18 per square foot of window replaced (Heating Zone 2) \$18 per square foot of window replaced (Heating Zone 3)
<b>8.6 Commercial Refrigeration</b>	
8.6.1 Anti-Sweat Heater (ASH) Controls	\$40 per linear foot of case
8.6.2 Efficient Refrigeration Evaporator Fan Motor	\$55 per motor (ECM or PMSM on Display Case) \$140 per motor (ECM or PMSM on Walk-In Cooler or Freezer)
8.6.3 Strip Curtains for Walk-In Coolers and Freezers	\$9 per square foot of doorway
<b>8.7 Commercial Kitchen and Food Service Equipment</b>	
8.7.1 Demand Controlled Kitchen Ventilation (BPA-Qualified)	\$200 per fan horsepower (one control sensor) \$400 per fan horsepower (multiple control sensors)
8.7.2 Electric Commercial Steam Cookers	\$500 per pan (6 pan)
8.7.3 Hot Food Holding Cabinets	\$250 per cabinet (Half Size) \$500 per cabinet (Full Size) \$1,000 per cabinet (Double Size)
8.7.4 Electric Combination Ovens	\$500 per oven (5-15 pan oven or 16-20 pan oven)
8.7.5 Electric Convection Ovens	\$200 per oven (Half size) \$400 per oven (Full size)
8.7.6 Pre-Rinse Spray Wash Valves	\$100 per spray valve

COMMERCIAL	
PROGRAM COMPONENT OR MEASURE	PAYMENT
<b>8.8 Additional UES Offerings</b>	
8.8.1 Generator Block Heaters (BPA-Qualified)	\$200 per unit (Size <3 kW) \$1,500 per unit (Size ≥3 kW)
8.8.2 Smart Power Strips	\$15 per strip
8.8.3 Vehicle Engine Block Heater Controls	\$200 per unit
8.8.4 Commercial Heat Pump Water Heaters	\$300 per tier 1 unitary HPWH \$600 per tier 2 unitary HPWH \$600 per tier 3 unitary HPWH \$800 per split-system HPWH
8.8.5 ENERGY STAR Commercial Clothes Washers	\$25-\$125 per washer
<b>Additional Multisector Opportunities</b>	
Some Agricultural, Industrial, or Residential measures may be applicable to Commercial projects. Measures eligible for installation in multiple sectors are identified where applicable in the body of the IM in the primary sector.	

INDUSTRIAL	
PROGRAM COMPONENT OR MEASURE	PAYMENT
<b>10.2 Energy Smart Industrial</b>	
10.2.1 Industrial Custom Projects	Refer to the <a href="#">Implementation Manual</a>
10.2.2 Small Industrial Projects	Refer to the <a href="#">Implementation Manual</a>
10.2.3 BPA-Funded Technical Service Providers (TSP)	Refer to the <a href="#">Implementation Manual</a>
<b>Other Industrial Measures</b>	
10.4 Variable Frequency Drives for Fans in Potato and Onion Storage Facilities	\$200 per horsepower.
10.5 Small Compressed Air Systems	Lesser of \$0.25 per kWh or 70% of project cost.
10.6 High Frequency Battery Charger Upgrade (BPA-Qualified)	Lesser of \$0.25 per kWh or 70% of project cost.
10.7 Welder Upgrade (BPA-Qualified)	Lesser of \$0.25 per kWh or 70% of project cost.
10.8 Water System Leak Abatement (BPA-Qualified)	Lesser of \$0.25 per kWh or 70% of project cost.
<b>Additional Multisector Opportunities</b>	
Some Commercial and Agricultural Sector measures may be applicable to Industrial Sector projects. Measures eligible for installation in multiple sectors are identified where applicable in the body of the IM in the primary applicable sector.	



<b>RESIDENTIAL</b>	
<b>PROGRAM COMPONENT OR MEASURE</b>	<b>PAYMENT</b>
<b>11.2 Lighting</b>	
11.2.1 LED Lamps	\$2.50-\$9/LED
11.2.2 TLED Lamps	\$3-\$5/TLED
<b>11.3 Advanced Power Strips &amp; Energy Saver Kits</b>	
11.3.1 Advanced Power Strips/Load Sensing (for Home Entertainment Centers)	\$15–25/unit
11.3.2 Energy Saver Kits	Refer to the <a href="#">Implementation Manual</a>
<b>11.4 Appliances</b>	
11.4 ENERGY STAR® Clothes Washers	\$25-\$100/washer
11.4 ENERGY STAR® Clothes Dryers	\$50-\$175/dryer
<b>11.5 EV Chargers</b>	
11.5.1 EV Chargers	\$20.00
<b>11.6 Electric Water Heating</b>	
11.6.1 Thermostatic Shut-Off Valves	\$14-\$20/unit
11.6.2–11.6.3 Unitary Heat Pump Water Heaters	\$300-\$700/ water heater
11.6.4 Split System Heat Pump Water Heaters	\$800/water heater
11.6.5 Pipe Insulation	\$5-\$25/unit
<b>11.7 Heating, Ventilation, Air Conditioning (HVAC) Measures</b>	
11.7.1.1 – 11.7.1.2 Ductless and Ducted Mini-Split Heat Pumps	Refer to the <a href="#">Implementation Manual</a>
11.7.2 HVAC Performance Tested Comfort Systems (PTCS)	Refer to the <a href="#">Implementation Manual</a>
11.7.2.1 PTCS Air-Source Heat Pumps (BPA-Qualified)	Refer to the <a href="#">Implementation Manual</a>
11.7.2.2 PTCS Variable-Speed Heat Pumps (BPA-Qualified)	Refer to the <a href="#">Implementation Manual</a>
11.7.2.3 PTCS Commissioning, Controls, and Sizing (BPA-Qualified)	Refer to the <a href="#">Implementation Manual</a>
11.7.2.4 PTCS Ground Source Heat Pumps (BPA-Qualified)	Refer to the <a href="#">Implementation Manual</a>
11.7.2.5 PTCS Duct Sealing	\$200-\$250
11.7.3 Prescriptive Duct Sealing (BPA-Qualified)	\$200-\$250
11.7.4 Duct Insulation	\$.60 per linear foot insulated
11.7.5 ASHP Conversion (without PTCS)	\$800
11.7.6 ASHP Conversion to Variable-Speed (without PTCS)	\$1,000
11.7.7 ASHP Upgrade (without PTCS)	\$20
11.7.8 Variable-Speed ASHP Upgrade (without PTCS)	\$150
11.7.9 Centrally Ducted Air Conditioners	\$60
11.7.10 Packaged Terminal Heat Pump	\$125-\$200
<b>11.8 Thermostats</b>	
11.8.1 Line Voltage Thermostats	\$18

<b>RESIDENTIAL</b>	
<b>PROGRAM COMPONENT OR MEASURE</b>	<b>PAYMENT</b>
11.8.2 Advanced Smart Thermostats	\$140-165
11.8.3 Communicating Line Voltage Thermostats	\$35
<b>11.9 New Construction</b>	
11.9.1 NEEM 1.1 and 2.0 versions	\$1,200-\$1,400/home
11.9.2 Replacement of Pre-1976 Manufactured Home with NEEM Certified Home	\$2,200-\$2,500/home
11.9.3 Single-Family New Construction Performance Path	Varies based on measures installed
11.9.4 Montana House	Refer to the <a href="#">Implementation Manual</a>
11.9.5 Energy Efficient New Multifamily Construction	Refer to the <a href="#">Implementation Manual</a>
11.9.6 Zero Energy Ready New Multifamily Construction	Refer to the <a href="#">Implementation Manual</a>
<b>11.10 Weatherization</b>	
11.10.1 Insulation	Refer to the <a href="#">Implementation Manual</a>
11.10.2 Prime Window and Patio Door Replacement	\$2-\$16/square foot
11.10.3 Low-E Storm Windows	\$2/square foot
11.10.4 Exterior Insulated Doors	\$40/door
11.10.5 Whole House Air Sealing and Testing	Refer to the <a href="#">Implementation Manual</a>
11.10.6 Prescriptive Air Sealing	Refer to the <a href="#">Implementation Manual</a>
<b>11.11 Low-Income Energy Efficiency Measures</b>	
Weatherization, Ductless and PTCS Ducted Air-Source Heat Pumps, PTCS and Prescriptive Duct Sealing, Duct Insulation, Contractor-installed Smart Thermostats, and Heat Pump Water Heaters	Refer to the <a href="#">Implementation Manual</a>
<b>11.12 Behavioral</b>	
11.12.1 Behavioral Home Energy Reports (BPA Qualified)	\$12/household