

NED Update

NED

Northwest Efficiency Depot

May 1, 2014



AGENDA

- 10:00-10:10 Welcome
- 10:10-10:15 Introduction of NED Stakeholder Team
- 10:15-10:30 IS2.0 Status
- 10:30-11:45 Overview of NED and other EE Systems in Development
- PTCS
 - EEBI
 - NED
- 11:45-12:00 Q&A



Introduction of Stakeholder Team



1. Debbie DePetris, Clark PUD
2. Dennis Gau, Seattle City Light
3. Duffel Gray, Coos Curry Electric
4. Eric Miler, Benton REA
5. Eugene Rosolie, Cowlitz PUD
6. James Sykes, Franklin PUD
7. Jed Morrell, City of Monmouth
8. Jeff Stafford, Tacoma Power
9. Jennifer Sherrell, Cowlitz PUD
10. Jessica McLaws, EWEB
11. Jessica Mitchell, Snohomish PUD
12. Kathy Moore, Umatilla Electric
13. Keith Lockhart, Springfield Utility Board
14. Lisa Atkin, EWEB
15. Margaret Ryan, PNGC
16. Michael Coe, Snohomish
17. Mike Little, SCL
18. Nicolle, Prehn, Columbia River PUD
19. Rob Currier, Emerald PUD
20. Thomas Elzinga, Consumers Power
21. Tom Schumacher, Benton PUD
22. Traci Brock, Wasco Electric
23. Vic Hubbard, Franklin PUD
24. Vicki Bergum, Benton PUD



Energy Efficiency Interim Solution 2.0

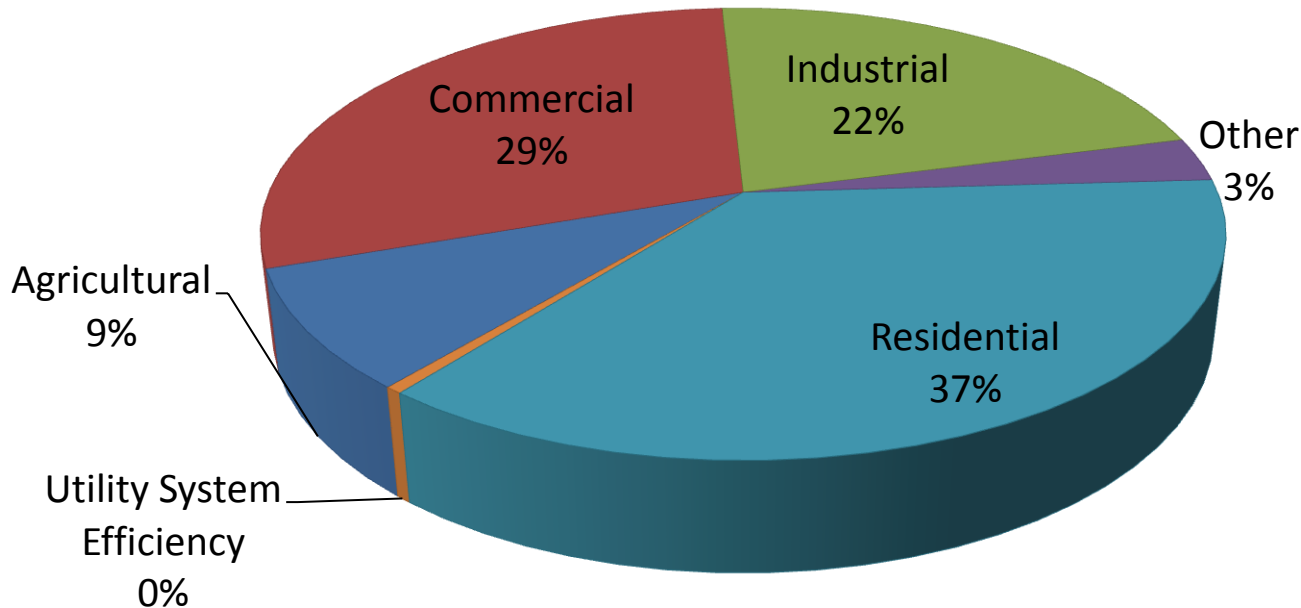
Status





Status as of 4/27/14

# Invoice Packages	Total Reimbursements (\$)			kWh Savings			
	Total Invoice	BPA Funded	Performance Payment	Reportable	BPA Funded	Self Funded	Non-Reportable
2,345	\$155,213,635	\$130,910,206	\$24,303,429	1,149,408,179	777,405,169	372,003,010	99,298,563



- IS2.0 went live on 12/10/2012
- Slightly less than 1 ½ years

We have also learned a lot...

- 1,290 Canceled Invoices
- 393 Reported IS2.0 Issues
 - Open 9
 - Closed 351
 - Deferred to NED 33
- Same team supporting IS2.0 is also working on NED

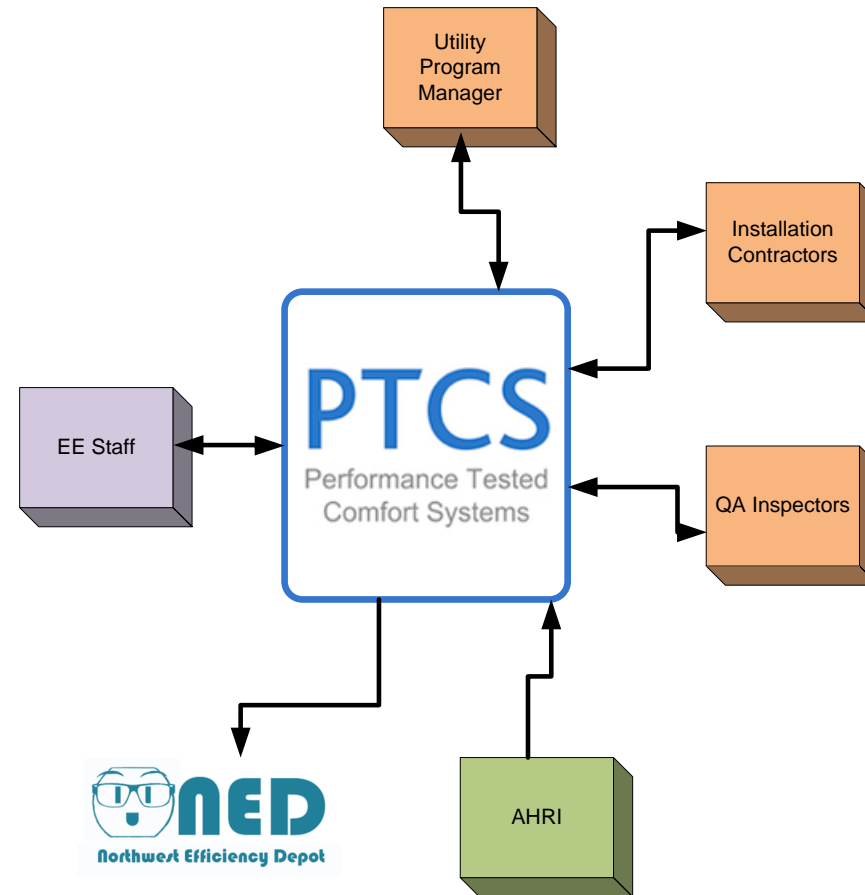


Project Status



PTCS Overview and Status

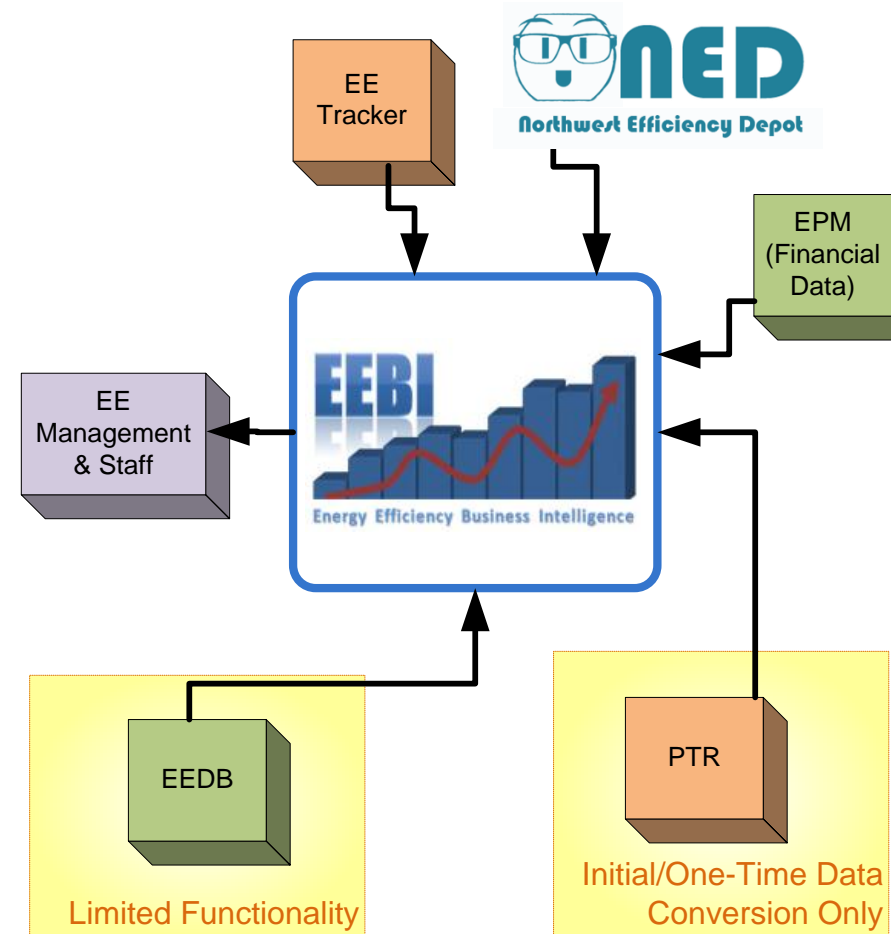
- Simplifying PTCS
 - No savings changes
 - Aligned with Round Table presentations
 - Moving PTCS to bpa.gov
 - 56 planned fixes and refinements
 - Will not look like a new system, just better
 - Two months of testing
 - Integrating with NED once NED is live
- Status:
 - Development proceeding on Schedule
 - Go-Live: 1st Quarter FY15



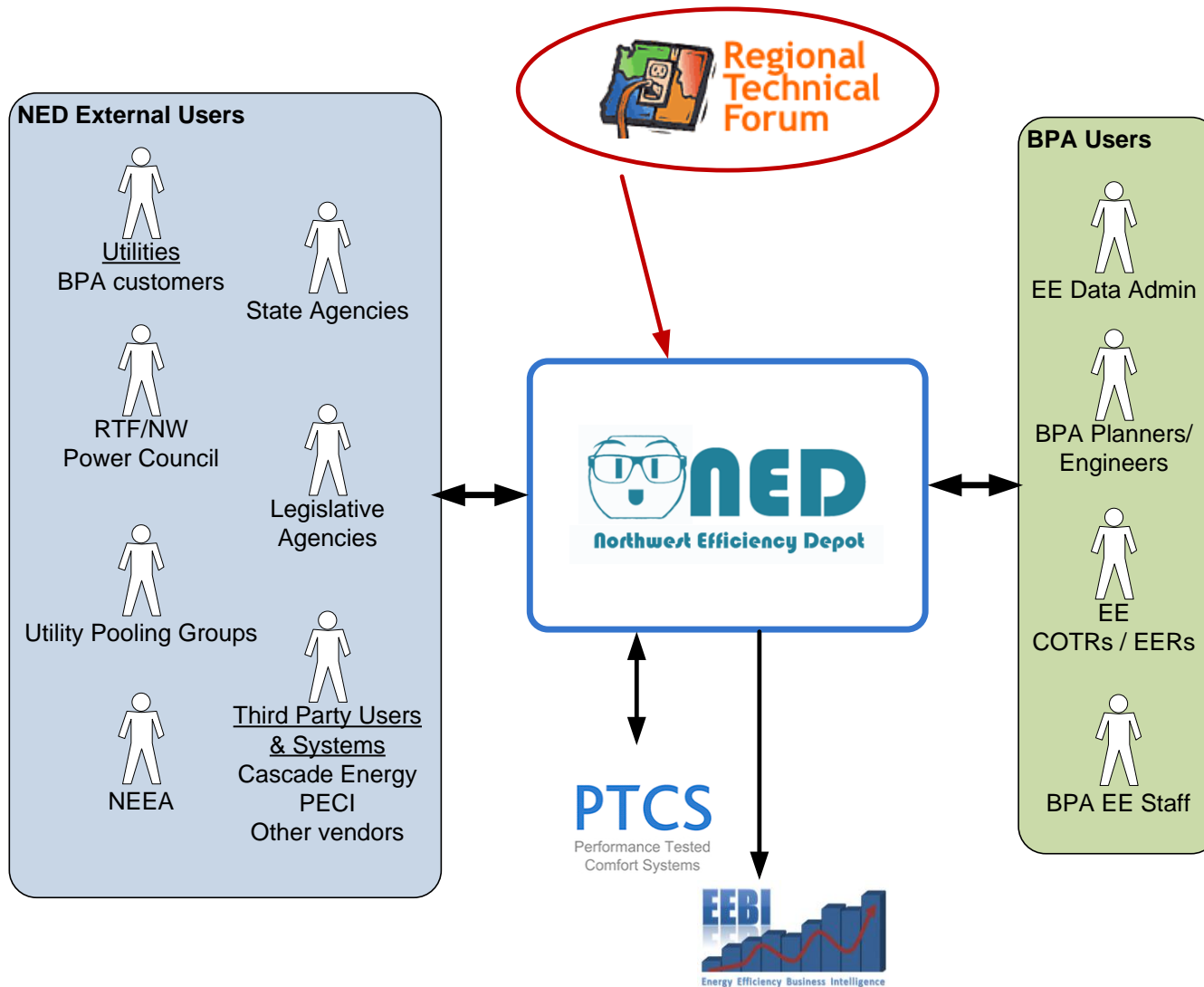
EEBI Overview and Status

- Regional reports:
 - Reports on kWh Savings achieved
 - Data for Red Book
 - Reports for NW Power & Conservation Council
 - Data Analytics for Planning & Decision Making
- Will include Historical Data from PTR
- Status:
 - On-Schedule
 - Schedule: 3rd Quarter FY15

Energy Efficiency Business Intelligence



NED Overview



1. Communication Support

- a. Ability to see Updates and Announcements made by BPA
- b. Document Download center available to download important documents directly from NED

2. Budgets

- a. Ability to view the Utility budgets for all budget categories, Actual Expenditures, Performance Payments, Committed Funds due to work in the pipeline, and Uncommitted funds available.
- b. Eliminate the need to do a contract revision for each budget change. NED will serve as the official record of the budget.
- c. Ability to provide an on-line request for Budget Transfers (including Bi-Lateral transfers, Transfers to/from ESG or Simple Steps, Unassigned Account Requests, etc.)

3. kWh Savings

- a. Ability to select different combinations of Approved Invoices / BPA Non-Reportable Expenditures / In-process Expenditures and see the associated kWh Savings
- b. Ability to tag measures/projects to make reporting savings easier
- c. Ability to select different timeframes (i.e., Fiscal Years, Calendar Years, Months, etc.) to view savings based on the Completion Dates of the measures
- d. Ability to break out Savings by Sector, End Use, Category, Technology/Activity/Practice

4. Option 1 Custom Projects

- a. Ability to create and obtain approvals for Option 1 proposals on-line
- b. Ability to create and obtain approvals for Option 1 Completion Reports on-line
- c. Option 1 Projects can be entered at either Proposal or Completion Report Stage

5. Option 2 Custom Projects

- a. Ability to bulk upload Option 2 projects with immediate validation & feedback

6. Deemed (UES) Measures

- a. Automatically filtered to allowed Heating/Cooling Zones for your utility
- b. Ability to sort and select measures to implement
- c. Ability to add measures to your Favorites
- d. Ability to bulk upload or directly enter UES Measures into NED Screens
- e. RTF Measures will be available for BPA Non-Reportable uses
- f. PTCS Measures will be automatically forwarded from PTCS System and will be available to add to an Invoice

7. Calculators

- a. Ability to bulk upload Lighting, Compressed Air, and future (yet to be announced) Calculators
- b. Ability to enter Energy Management Calculators directly into NED

8. 3rd Party Measures / Custom Projects

- a. Ability to view the details of 3rd Party Measures implemented on your behalf (i.e., Energy Smart Grocer, Simple Steps, etc.)
- b. Ability to receive and see the savings associated with 3rd Party Measures

9. Common functions

- a. Ability to optional track Utility Costs for all Measures/Projects
- b. Immediate validation and feedback on all data bulk uploaded or entered into screens
- c. Warning messages to highlight potential duplicate projects/measures
- d. Ability to view history of projects/measures
- e. Ability to search sort, select, copy previous projects/measures
- f. Ability to export all data shown in tables to Excel or CSV format
- g. Ability to re-upload erroneous data (for some type of data fix directly in NED screens)
- h. Ability to attach supplemental documents directly to measures/projects (eedocs@bpa.gov email will no longer be needed)
- i. Audit Trail of changes made in the system
- j. Ability to have Contractors / Trade Allies enter data on your behalf and track what data they entered
- k. Help Functions available to guide you through NED Screens

10. Reporting

- a. Ability to run reports directly from NED
- b. History will be available for all data entered into IS2.0 or NED

11. Invoices

- a. Smart Invoice Creation Features (e.g., select all completed measures/projects with a completion date between x and y, or select all completed measures/projects that have not been already invoiced, etc.)
- b. Measures/Projects cannot be added to invoice if they have errors (or are incomplete)
- c. Ability to preview Invoice before Submitting, including the impact to your budget
- d. COTR cannot Approve an Invoice unless Budget is Available
- e. Status history of Invoice, including the actual date paid
- f. Ability to correct Invoices are they are paid (requires COTR approval)

Deploying NED

- Providing Training just prior to Rollout
- Rollout to small group of utilities at a time
- Looking at about 2 month window to roll-out to all Utilities
- If any major problems occur, can roll-back to using IS2.0.

- Status:
 - Issues
 - Staffing issues have delayed the analysis and development
 - Some functionality within NED was underestimated
 - Resolution
 - Hired 2 new contractors and moved staff from other efforts to NED
 - Project has been rescheduled
- Currently on target for: 3rd Quarter FY15



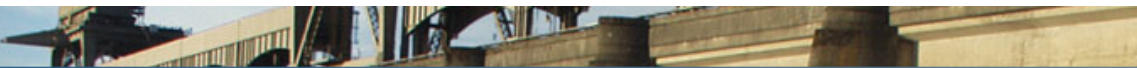
Northwest Efficiency Depot

Look and Feel

Construction Site
Please watch your step!



- Screen Mock-ups/Drawings
- Used to guide developers
- Final Screens may look different (colors, layout, etc.)



Budget Status - Summary for Current Rate Period 2014-2015

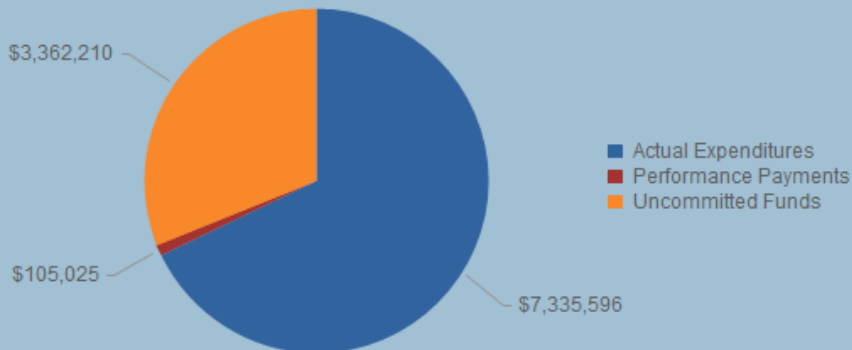
Total Budget: \$11,777,831.00
Remaining Funds: \$4,337,210.00
Available for Transfers: \$3,362,210.00

Invoices Paid this Rate Period

Number of Invoices Paid: 3
 Total Actual Expenditures: \$0.00

Performance Payments

Maximum % of Budget: 20 %
 Maximum Allowed: \$2,475,241.00
 Performance Payments Received: \$105,025.00
 Remaining Available *: \$4,337,210.00
 * cannot exceed remaining funds



Budget Status - Details

[Filtering](#) [Refresh](#)

	Budget Category	A	B	C	D = A - (B + C)	E
		Total Budget	Actual Expenditures	Performance Payments	Remaining Funds	In-process E
Rate Period for: 2014-2015						
View	10033: Energy Smart Industrial: 2013-2015 2014-2015	\$598,374.00	\$161,164.00	\$0.00	\$437,210.00	
View	10033: Utility Budget: 2013-2015 2014-2015	\$11,179,457.00	\$7,174,432.00	\$105,025.00	\$3,900,000.00	

[Filtering](#) [Refresh](#) [Export Excel](#) [Export CSV](#)

Credit Reimbursement (\$/Unit)	Vintage	Installation Type	Primary Bldg Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0.00	Existing	NoFilter	Non building measure (Motors)
0.00	Existing	Contains	Non building measure (Motors)
0.00	Existing	DoesNotContain	Non building measure (Motors)
0.00	Existing	StartsWith	Non building measure (Motors)
0.00	Existing	EndsWith	Non building measure (Motors)
0.00	Existing	EqualTo	Non building measure (Motors)
0.00	Existing	NotEqualTo	Non building measure (Motors)
0.00	Existing	GreaterThan	Non building measure (Motors)
0.00	Existing	LessThan	Non building measure (Motors)
0.00	Existing	GreaterThanOrEqualTo	Non building measure (Motors)
0.00	Existing	LessThanOrEqualTo	Non building measure (Motors)
0.00	Existing	Between	Non building measure (Motors)
0.00	Existing	NotBetween	Non building measure (Motors)
0.00	Existing	IsEmpty	Non building measure (Motors)
		NotIsEmpty	
		IsNull	
		NotIsNull	

Dashboard

Welcome

Welcome to NED.

The Northwest Efficiency Depot is Bonneville Power Administration's system for collecting and reporting on Energy Efficiency costs, reimbursements and energy savings for the Northwest region.

Current Rate Period Budget Summary [Details](#)

Total Budget:	\$ 12,002,392.00
Actual Expenditures:	\$ 11,977,837.00
Remaining Funds:	\$ 24,501.00
Available for Transfers:	\$ 17,834.00

Current Rate Period kWh Savings Summary [Details](#)

Sector	Total	BPA Incentivized	Self Funded	Non-Reportable
Agricultural	4,648,969	3,657,660	991,308	0
Commercial	23,846,398	18,592,859	5,253,538	13,947,191
Industrial	144,738,758	54,326,175	90,412,582	35,436,385
Residential	1,371,138	1,249,553	121,584	0
Utility System Efficiency	4,218,671	3,466,945	751,726	0
Multi-Sector	10,844,155	8,702,382	2,141,773	0
Total	189,668,089	89,995,574	99,672,511	49,383,576

Announcements [Details](#)

Topic	Announcement	Posted
Program	<p>Smart Water Heat Adds Two New Electrolux Models Electrolux has two new heat pump water heaters (EF66WP30PS and EF66WP35PS) that have been added as Tier 2 models on the Qualified Products List, effective Nov. 15, 2013. Both models qualify for the Smart Water Heat Tier 2 rebate, which is available until March 31, 2014.</p> <p>Electrolux is in the process of working with its supply chain to have product available at retail in early Q1 of 2014. Smart Water Heat will provide updates on product availability as they become available.</p>	12/19
General	<p>Implementation Manual (IM) has been revised Several small revisions have been made to the Implementation Manual. These changes which are primarily language clarifications are listed below. You can find more detail in Updates and Revisions section of the Implementation Manual.</p>	12/19
General	<p>Public Comment on Post-2011 Review Scope and Process BPA requests that utility customers and stakeholders use this public comment period to provide feedback on the issues within scope for the Review, express interest in participating in a workgroup or multiple workgroups, inform BPA of willingness to host regional meetings, sign up to receive future communication regarding the Post-2011 Review. For more information: http://www.bpa.gov/Energy/NV/post-2011/</p> <p>Smart Water Heat Offers Limited-time Increase and Extension to Tier 2 Rebate To increase Tier 2 heat pump water heater sales through the</p>	12/10

Budget Transfer

- New
- [View](#) | [Cancel](#)
- [View](#)
- [View](#)
- [View](#) | [Approve](#)

Budget Transfer Wizard □ ×

- Step 1: Identify Rate Period ▲
- Step 2: Verify Contact Information ▲
- Step 3: Identify Transfer Funding ▲

Customers must commit to a funding period of a minimum of six months, or be approved for participation by Fluid.

Funding Period

	Start Date	End Date
	<input type="text" value=""/>	<input type="text" value=""/>

Funds will be spent in your service territory in support of Simple Steps, Smart Savings. BPA will revise your ECA Implementation Budget to reflect a reduction of the allotted funding.

BPA Funded

		Maximum \$ Available for Transfer		
From:	<input type="text" value="Utility EEI Budget"/>	<input type="text" value="\$53,000.00"/>		
		Current Budget	\$ Change Requested (+/-)	Total \$
To:	<input type="text" value="Simple Steps Budget"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$10,000.00"/>	<input type="text" value="\$10,000.00"/>



Questions and Answers