

Request for Proposals

Energy Savings Account Pilot Participation

Summary

Efficiency Vermont, the statewide Energy Efficiency Utility, in partnership with the Department of Public Service (Department) and the Agency of Commerce and Community Development (ACCD), invites commercial and industrial customers to respond to this Request for Proposals (RFP) to be considered for participation in the Energy Savings Account (ESA) Pilot program.¹

To be eligible to participate in the pilot, customers must pay at least \$5,000 in electric Energy Efficiency Charges (EEC) annually.² Facilities served by Burlington Electric Department are not eligible.

Responding to this RFP is required to be considered for participation in the ESA Pilot.

Responses to this RFP must be delivered electronically to Efficiency Vermont by **5:00 p.m. EDT on Friday, June 21, 2019**. Efficiency Vermont will not accept responses submitted after 5:00 p.m. EDT on this date. Please submit your response electronically via e-mail to: jlesko@efficiencyvermont.org with *RFP Submittal for ESA Pilot* in the subject line.

Efficiency Vermont will respond to questions regarding this RFP as follows: Efficiency Vermont will accept questions regarding requirements of the RFP until **5:00 p.m. EDT Friday, May 31, 2019** via e-mail only, to jlesko@efficiencyvermont.org with *ESA Pilot RFP Question* in the subject line. Efficiency Vermont will post answers on the Efficiency Vermont website (<https://www.efficiencyvermont.com/about/requests-for-proposals>) no later than **5:00 p.m. EDT, Wednesday, June 5, 2019**. Efficiency Vermont will not address questions regarding the RFP submitted after 5.00 p.m. EDT, May 31, 2019.

RFP Schedule / Milestones

| | |
|---|------------------|
| RFP release | May 24, 2019 |
| RFP questions accepted until | May 31, 2019 |
| Answers to submitted questions posted | June 5, 2019 |
| Proposals due | June 21, 2019 |
| Proposal review period | June 21-28, 2019 |
| Selected participants notified, proposed to Public Utilities Commission | July 1, 2019 |
| EEC contributions of participants begin accruing | July 1, 2019 |
| EEC contribution accruals end | June 30, 2022 |
| Unused EEC contributions of participants returned to statewide benefit | July 1, 2022 |

¹ Created under Act No. 150, Sec. 2 of the 2017-2018 Vermont Legislative Session (H.739). See Attachment A.

² To participate customers must have paid at least \$5,000 in EEC over the last year or the average of last 3 years EEC exceeds \$5,000 or the customer is in a new building and estimates paying an EEC of at least \$5,000.

RFP Post Date: [May 24, 2019]

Responder Questions Due: [May 31, 2019]

Answers Posted: [June 5, 2019]

Responses Due: [June 21, 2019]

Submittal To: jlesko@efficiencyvermont.com

Program Overview

On May 16, 2019, in accordance with 2018's *Act No. 150*, the Public Utilities Commission issued the *Order Regarding Energy Savings Account Pilot Program*, in *Case No. 19-0302-INV*, establishing the ESA Pilot Program, a new avenue for commercial and industrial companies to save on energy costs. Participants in the ESA Pilot shall complete a project or series of projects to reduce or transform overall energy consumption and spur economic opportunities. Customers participating in the 3-year Pilot will be able to use up to 100% of their electric energy efficiency charge to pay for the full cost of eligible projects, technical assistance, and evaluation, measurement, and verification.³ These are defined below, along with other participant expectations and requirements outlined in *Act No. 150*.

Customer Eligibility:

To be eligible to participate in the ESA Pilot, customers must pay at least \$5,000 in EEC annually.⁴ Facilities served by Burlington Electric Department are not eligible. ESA participants will not be eligible for other Efficiency Vermont services.

Project Eligibility:

The Pilot enables funds to be used for one or more of the following:

- Electric energy efficiency;
- Thermal energy and process-fuel efficiency for all unregulated fuels, such as propane and oil;
- Thermal energy and process-fuel efficiency for manufacturers using regulated fuels (i.e. natural gas) in excess of 600,000 MCF in 2017;
- Energy productivity measures (e.g. investments that reduce the amount of energy required to produce a unit of product);
- Demand management; and
- Energy storage that provides benefits to the customer and its interconnecting utility.

The intent of *Act No. 150* is to enable a broader set of benefits to be recognized and paid for under the pilot. Cost-effectiveness screening will, in part, include the traditional energy and non-energy benefits as implemented by the EEU. It will also include economic development factors such as job creation, job retention, and capital investment. Once selected for the program participants will be required to submit all data to Efficiency Vermont and the Department of Public Service demonstrating project cost-effectiveness prior to accessing ESA funds. A complete list of the data points needed for calculating the traditional energy and non-energy cost-effectiveness can be found in *Attachment A* of this RFP.⁵ If participants require assistance compiling these data, Efficiency Vermont or another vendor may be hired to provide this service (see also, Technical Assistance, below).

Technical Assistance

Many businesses hire technical experts to identify and develop the types of projects enabled in the ESA Pilot, to analyze and prioritize the highest impact projects based on the business' objectives, or to determine cost-effectiveness of a project or projects. *Act No. 150* enables participants to utilize ESA funds for this type of technical assistance.

³ Technical assistance, evaluation, measurement and verification costs may be a predetermined flat fee or charged on a per project basis.

⁴ To participate customers must have paid at least \$5,000 in EEC over the last year or the average of last 3 years EEC exceeds \$5,000 or the customer is in a new building and estimates paying an EEC greater than \$5,000.

⁵ Please note the Public Utility Commission will issue guidance on the non-traditional screening requirements for economic development in the future but not in advance of the completion date for this RFP.

Evaluation, Measurement, and Verification (EM&V)

The main objective of an EM&V process is to assess the actual performance of an energy project once it's been completed; to measure the energy or demand savings; and to determine if the project is generating the expected level of savings. The cost of EM&V varies with the frequency, complexity, and scope of data collection and analysis. On average EM&V comprises 3% of project costs, but actual individual project costs could be higher or lower. *Act No. 150* requires Efficiency Vermont and the Department of Public Service to evaluate and verify the savings of each project funded under the ESA Pilot with no less rigor than is required by ISO-New England for its Forward Capacity Market (FCM) program. This entails the collection and analysis of the data used to estimate cost-effectiveness (see also, Project Eligibility, above). A list of typical data needed for EM&V to be completed can be found in *Attachment B* of this RFP. Additional data requirements may be needed dependent on the measures implemented. If participants require assistance compiling these data, Efficiency Vermont or another vendor may be hired to provide this service.

Other Customer Requirements and Information:

In accordance with *Act No. 150*, each customer selected to participate in the ESA Pilot shall work with Efficiency Vermont, prior to receipt of ESA funds, to develop an energy management plan for the three-year period of the pilot, identifying energy savings targets, projects to be implemented in pursuit of those targets, and a timeline for those projects and associated investments. A copy of each plan shall be submitted to the Commission, the Department, and ACCD. An example of an energy management plan template is included in this RFP as *Attachment C*.

By submitting a response to this RFP, the respondent (1) acknowledges that it is doing so voluntarily and without guarantee of future participation in the ESA Pilot, and (2) authorizes its response being reviewed by Efficiency Vermont, the Department of Public Service, and the Agency of Commerce and Community Development. Responses will not be shared with any other persons or entities unless required by law or demanded through valid legal process, such as through a warrant, subpoena, or access to public records request. If the response includes material that is considered by the respondent to be proprietary and confidential under the State's Public Records Act, 1 V.S.A. § 315 et seq., the respondent shall submit a cover letter that clearly identifies each page or section of the response that it believes is proprietary and confidential. The respondent shall also provide in their cover letter a written explanation for each marked section explaining why such material should be considered exempt from public disclosure in the event of a public records request, pursuant to 1 V.S.A. § 317(c), including the prospective harm to the competitive position of the respondent if the identified material were to be released. Additionally, the respondent must include a redacted copy of its response for portions that are considered proprietary and confidential. Redactions must be limited so that the reviewer may understand the nature of the information being withheld. It is typically inappropriate to redact entire pages, or to redact the titles/captions of tables and figures. Under no circumstances can the entire response be marked confidential, and the review committee reserves the right to disqualify responses so marked.

Selection Criteria

The review committee seeks:

- **Workplans** that include the required information (see #4 below) and demonstrate alignment with objectives of the ESA Pilot to reduce or transform overall energy consumption and spur economic opportunities, including job growth, job retention, and capital investment
- A **diverse pool of project types**
- Demonstrated **experience** of businesses and Institutions in energy management, including, but not limited to, employing staff who promote and implement energy management, completion of past energy management projects, etc.
- Businesses and institutions that serve as **anchor companies** in rural areas (large employers that are recognized as key to a region’s economic vitality)
- **Energy intensive** businesses and institutions with opportunities to significantly reduce or transform energy consumption
- A **geographically diverse** participant pool, both by county and by distribution utility
- A **diverse pool of industries** and business types (e.g., manufacturers, institutions, breweries, etc.).

Criteria weighting:

| | |
|---|-----|
| Workplan, including diverse project types | 35% |
| Demonstrated energy management experience | 25% |
| Anchor companies | 15% |
| Energy intensity of business or institution | 10% |
| Underrepresented geography or utility | 10% |
| Underrepresented Industry | 5% |

Instructions for Response

Respondents should prepare complete responses to the following questions. The review committee respectfully requests that respondents follow the numbering protocol precisely, and refrain from reordering or renumbering questions, skipping questions, or including information in addition to these questions. Responses to this RFP must be delivered electronically to Efficiency Vermont by **5:00 p.m. EDT on Friday, June 21, 2019**. Please submit your response as either a Word or PDF format attachment via e-mail to: jlesko@efficiencyvermont.org with RFP Submittal for ESA Pilot in the subject line.

- 1) Basic information about the Business or Institution
 - a. Name and address of Business or Institution
 - b. Name and contact information for person submitting RFP response
 - c. Number of people employed by Business or Institution
 - d. Square footage of Business or Institution facility(ies)

- 2) Is an energy services contractor completing this RFP on behalf of the Business? If so, please provide contractor name and contact information.

- 3) Annual energy consumption for this Business or Institution facility(ies)

| Energy Type | Annual Consumption | Annual Cost (\$) |
|---|--|------------------|
| Electric | MWH | \$ |
| Electric Demand | kW (<i>summer peak demand</i>) kW (<i>winter peak demand</i>) | \$ |
| Regulated Fuel (VGS customers only) | | |
| Space Heating | Therms/MCF | \$ |
| Process Fuel | Therms/MCF | \$ |
| <small>(total usage is acceptable, if split is unknown or not applicable)</small> | | |
| Unregulated Fuel | | |
| Space Heating | Therms/MCF | \$ |
| Process Fuel | Therms/MCF | \$ |
| <small>(total usage is acceptable, if split is unknown or not applicable)</small> | | |

- 4) Describe the Business or Institution's current goals and **workplan**. At a minimum, this should include:
 - a. Organizational energy goal(s)
 - b. Actions, measures, or projects that the organization hopes to undertake as part of the ESA pilot program to meet goal(s). This may include feasibility assessments.
 - c. Timelines and budgets

- 5) Describe the Business or Institution's **experience** with energy management, including energy project identification and development, energy data collection and analysis, and any past or current goals related to energy management.
 - a. Does this Business or Institution manage these efforts with in-house expertise, or with an energy services contractor, or both?

- 6) Describe the Business or Institution's role as an **anchor company** within the community.

About Efficiency Vermont

Launched in 2000, Efficiency Vermont helps ratepayers reduce energy costs, strengthen the local economy, and protect the environment by making homes and businesses energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households, businesses and other institutions reduce their energy costs with energy-efficient equipment, lighting, and approaches to construction and major renovation. Efficiency Vermont partners extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

Efficiency Vermont is operated by Vermont Energy Investment Corporation under an Order of Appointment issued by the Vermont Public Utilities Commission. For additional information, please visit www.encyvermont.com.

Attachment A
(ESA Pilot language starts in Section 2)

Act No. 150

VT LEG #333785 v.1

No. 150. An act relating to energy productivity investments under the self-managed energy efficiency program.

(H.739)

It is hereby enacted by the General Assembly of the State of Vermont:

Sec. 1. 30 V.S.A. § 209 is amended to read:

§ 209. JURISDICTION; GENERAL SCOPE

* * *

(j) Self-managed energy efficiency programs.

(1) There shall be a class of self-managed energy efficiency programs for transmission and industrial electric ratepayers only.

(2) The Commission, by order, shall enact this class of programs.

(3) Entities approved to participate in the self-managed energy efficiency program class shall be exempt from all statewide charges under subdivision (d)(3) of this section that support energy efficiency programs performed by or on behalf of Vermont electric utilities. If an electric ratepayer approved to participate in this program class also is a customer of a natural gas utility, the ratepayer shall be exempt from all charges under subdivision (d)(3) of this section or contained within the rates charged by the natural gas utility to the ratepayer that support energy efficiency programs performed by or on behalf of that utility, provided that the ratepayer complies with this subsection.

(4) All of the following shall apply to a class of programs under this subsection:

(A) A member of the transmission or industrial electric rate classes shall be eligible to apply to participate in the self-managed energy efficiency program class if the charges to the applicant, or to its predecessor in interest at the served property, under subdivision (d)(3) of this section were a minimum of:

(i) \$1.5 million during calendar year 2008; or

(ii) \$1.5 million during calendar year 2017.

(B) A cost-based fee to be determined by the Commission shall be charged to the applicant to cover the administrative costs, including savings verification, incurred by the Commission and Department. The Commission shall determine procedures for savings verification. Such procedures shall be consistent with savings verification procedures established for entities appointed under subdivision (d)(2) of this section and, when determined to be cost-effective under subdivision (L) of this subdivision (4), with the requirements of ISO-New England for the forward capacity market (FCM) program.

(C) An applicant shall demonstrate to the Commission that it has a comprehensive energy management program with annual objectives. Achievement of certification of ISO standard 14001 shall be eligible to satisfy the requirements of having a comprehensive program.

(D) An applicant eligible pursuant to subdivision (A)(i) of this subdivision (j)(4) shall commit to an annual average ~~energy efficiency~~ investment in energy efficiency and energy productivity programs and measures during each three-year period that the applicant participates in the program of no not less than \$1 million. An applicant eligible pursuant to subdivision (A)(ii) of this subdivision (j)(4) shall commit to an annual average investment in energy efficiency and energy productivity programs and measures during each three-year period that the applicant participates in the program of not less than \$500,000.00. To achieve the exemption from energy efficiency charges related to natural gas under subdivision (3) of this subsection (j), the an applicant shall make an additional annual energy efficiency investment in an amount not less than \$55,000.00. As used in this subsection (j), “energy productivity programs and measures” means investments that reduce the amount of energy required to produce a unit of product below baseline energy use. Baseline energy use shall be calculated as the average amount of energy required to make one unit of the same product in the two years preceding implementation of the program or measure.

(E) Participation in the self-managed program includes efficiency and productivity programs and measures applicable to electric and other forms of energy. A participant may balance ~~efficiency~~ investments in such programs and measures across all types of energy or fuels without limitations.

(F) A participant shall provide to the Commission and Department annually an accounting of ~~energy~~ investments in energy efficiency and energy productivity programs and measures and the resultant energy savings in the form prescribed by the Commission, which may conduct reasonable audits to ensure the accuracy of the data provided.

(G) The Commission shall report to the General Assembly annually by on or before April 30 concerning the prior calendar year's class of self-managed energy efficiency programs. The report shall include identification of participants, their annual investments, and resulting savings, and any actions taken to exclude entities from the program.

(H) Upon approval of an application by the Commission, the applicant shall be able to participate in the class of self-managed energy efficiency programs.

(I) On a determination that, for a given three-year period, a participant in the self-managed efficiency program class did not meet or has not met the commitment required by subdivision ~~(4)(D)~~ of this ~~subsection~~ subdivision (j)(4), the Commission shall terminate the participant's eligibility for the self-managed program class.

(i) On such termination, the former participant will be subject fully to the then existing charges applicable to its rate class without exemption under subdivision (3) of this subsection (j), and within 90 days after such termination shall pay:

(I) the difference between the investment it made pursuant to the self-managed energy efficiency program during the three-year period of noncompliance and the full amount of the charges and rates related to energy efficiency it would have incurred during that period absent exemption under subdivision (3) of this subsection (j); and

(II) the difference between the investment it made pursuant to the program within the current three-year period, if different from the period of noncompliance, and the full amount of the charges and rates related to energy efficiency it would have incurred during the current period absent exemption under subdivision (3) of this subsection (j).

(ii) Payments under subdivision ~~(4)(I)(i)~~ of this ~~subsection (j)~~ subdivision (4)(I) shall be made to the entities to which the full amount of charges and rates would have been paid absent exemption under subdivision (3) of this subsection (j).

(iii) A former participant may not reapply for membership in the self-managed program after termination under this subdivision (4)(I).

(J) A participant in the self-managed program class may request confidentiality of data it reports to the Commission if the data would qualify for exemption from disclosure under 1 V.S.A. § 317. If such confidentiality is requested, the Commission shall disclose the data only in

accordance with a protective agreement approved by the Commission and signed by the recipient of the data, unless a court orders otherwise.

(K) Any data not subject to a confidentiality request under subdivision ~~(4)(J)~~ of this ~~subsection~~ subdivision (4) will be a public record.

(L) A participant in the self-managed program class ~~may~~ shall work with the Department of Public Service to determine whether it is cost-effective ~~to submit projects to the independent system operator of ISO-New England, including through recognized independent aggregators,~~ for payments under ~~that operator's forward capacity market~~ the FCM program, ~~and shall invest such payments in electric or fuel efficiency.~~

(i) As used in this subdivision (L), "cost-effective" requires that the estimated payments from the FCM program exceed the incremental cost of savings verification necessary for submission to that program.

(ii) If the Department determines the submission to be cost-effective, then an entity appointed to deliver electric energy efficiency services under subdivision (d)(2) of this section shall submit the project to the FCM program for payment and any resulting payments shall be remitted to the Electric Efficiency Fund for use in accordance with subdivision (e)(1)(A) of this section.

(M) A participant in the self-managed program class may receive funding from an energy program administered by a government or other entity ~~which~~ that is not the participant ~~but~~ and may ~~not~~ count such funds received as part of the annual commitment to its self-managed energy efficiency program.

Sec. 2. ENERGY SAVINGS ACCOUNT PARTNERSHIP PILOT

(a) Definitions. As used in this section:

(1) "ACCD" means the Agency of Commerce and Community Development under 3 V.S.A. chapter 47.

(2) "Commission" means the Public Utility Commission under 30 V.S.A. § 3.

(3) "Customer" means a commercial or industrial electric customer that is located in a service territory in which Efficiency Vermont delivers energy efficiency programs and measures and that does not qualify for SMEEP.

(4) "Customer EEC Funds" means a customer's EEC payments during the period of the ESA partnership project.

(5) “Department” means the Department of Public Service under 3 V.S.A. § 212 and 30 V.S.A. § 1.

(6) “EEC” means an energy efficiency charge on a customer’s retail electric bill under 30 V.S.A. § 209(d).

(7) “Efficiency Vermont” or “EVT” means the EEU whose appointment under 30 V.S.A § 209(d)(2) includes the delivery of programs and measures to customers of multiple electric distribution utilities.

(8) “Energy efficiency utility” or “EEU” means an entity appointed to deliver energy efficiency and conservation programs and measures under 30 V.S.A. § 209(d)(2).

(9) “Energy productivity measures” means investments that reduce the amount of energy required to produce a unit of product below baseline energy use. Baseline energy use shall be calculated as the average amount of energy required to make one unit of the same product in the two years preceding implementation of the program or measure.

(10) “ESA” means an energy savings account under 30 V.S.A. § 209(d)(3)(B).

(11) “ESA Partnership Pilot” means the three-year pilot program established by this section.

(12) “Regulated fuel” shall have the same meaning as in 30 V.S.A. § 209(e).

(13) “SMEEP” means the self-managed energy efficiency program established under 30 V.S.A. § 209(j).

(14) “Standing committees of jurisdiction” means the House Committee on Energy and Technology and the Senate Committees on Finance and on Natural Resources and Energy.

(15) “Unregulated fuel” shall have the same meaning as in 30 V.S.A. § 209(e).

(b) ESA Partnership Pilot; establishment. On or before July 1, 2019, the Commission by rule or order shall establish a three-year pilot program for customers to self-direct the use of their Customer EEC Funds, working with EVT. The total amount of Customer EEC Funds available in the pilot program each year shall not exceed \$2 million. The pilot program established under this section shall be an expansion of the ESA option under which:

(1) Notwithstanding any contrary provision of 30 V.S.A. § 209(d)(3)(B), the customer shall continue to pay its EEC and be able to receive an amount equal to 100 percent of its ESA account balance to pay for the full cost of projects that are eligible under subdivision (3) of this subsection; for technical assistance and other services from Efficiency Vermont; and for evaluation, measurement, and verification activity conducted by the Department or EVT.

(2) The customer may receive payments in advance of project completion from EVT based on the energy management plan submitted under subsection (e) of this section, estimated project costs,

and projected energy savings. However, a customer shall not receive advance payments from EVT that exceed the amount of Customer EEC Funds the customer has already paid.

(3) Notwithstanding any contrary provision of 30 V.S.A. § 209, the Customer EEC Funds may be used for one or more of the following: electric energy efficiency, thermal energy and process-fuel efficiency for unregulated fuels, energy productivity measures, demand management, and energy storage that provides benefits to the customer and its interconnecting utility. In addition, for a customer who is a manufacturer and whose purchases of regulated fuel exceeded 600,000 thousand cubic feet (MCF) in 2017, the Funds may be used for thermal energy and process-fuel efficiency for regulated fuels, and any regulated fuel savings attributable to investment of Customer EEC funds through the pilot program shall be counted towards EVT's performance indicators. EVT may allocate the cost of the pilot across regulated and unregulated fuel funding sources in a manner that avoids or reduces the need to adjust savings goals approved by the Commission.

(c) Methodology for evaluation, measurement, and verification. In its rule or order under subsection (b) of this section, the Commission shall establish a methodology for evaluation, measurement, and verification of projects implemented under the pilot that is consistent with the requirements of 30 V.S.A. § 218c and that includes cost-effectiveness screening that values energy savings across the customer's energy portfolio and non-energy benefits such as economic development. As used in this subsection, "economic development" includes job creation, job retention, and capital investment.

(1) This methodology may be considered for future establishment of EEU performance criteria under 30 V.S.A. § 209(d).

(2) EVT and the Department shall evaluate and verify the electricity savings of each project funded under the ESA Partnership Pilot with no less rigor than is required by ISO-New England for its Forward Capacity Market (FCM) program.

(d) Competitive solicitation. A customer shall apply to participate in the ESA Partnership Pilot through a competitive solicitation process conducted jointly by EVT, the Department, and ACCD

(1) Promptly after the Commission's rule or order under subsection (b) of this section becomes effective, EVT, the Department, and ACCD shall establish criteria for customer selection that are consistent with that rule or order and that take into account energy efficiency and economic development.

(2) On establishment of the selection criteria, EVT, the Department, and ACCD jointly shall issue a request for proposals (RFP) from customers seeking to participate in the ESA Partnership Pilot.

(3) EVT, the Department, and ACCD jointly shall select customers to participate in the ESA Partnership Pilot from among the customers that timely submit proposals in response to the RFP and shall notify the Commission of the selected customers.

(4) If EVT, the Department, and ACCD are unable to resolve an issue arising under this subsection, they shall bring the issue to the Commission for resolution.

(5) Customer selection under this subsection shall be completed before July 1, 2019.

(e) Energy management plans. Working with EVT, each customer selected for the ESA Partnership Pilot shall develop an energy management plan for the three-year period of the pilot with projects to be implemented, energy savings targets, and a timeline for projects and investments. A copy of each plan shall be submitted to the Commission, the Department, and ACCD.

(f) Other EEU services. A customer that participates in the ESA Partnership Pilot shall not be eligible for other EEU services, except for an EEU appointed to deliver natural gas efficiency programs and measures.

(g) Other funding. A customer that participates in the ESA Partnership Pilot may receive funding from an energy program administered by a government or other person that is not the participant, including an EEU appointed to deliver natural gas efficiency services, but shall not count such funds as part of the investment commitment of the ESA Partnership Pilot.

(h) Unused funds. At the end of the ESA Partnership Pilot, any Customer EEC Funds that have not been expended or committed under the pilot shall revert to use for systemwide energy efficiency programs and measures.

(i) Annual reports. On or before each November 1 from 2020 through 2022, the EVT and the selected customers jointly shall submit written progress reports to the Commission, the Department, and the standing committees of jurisdiction that include projects under the ESA Partnership Pilot and their associated energy and cost savings. A customer's projects under the pilot and the associated data and results shall be made public through this report. However, a customer may request that the Commission order customer-specific data to be used in preparing a report under this subsection be kept confidential if the data would qualify for exemption from disclosure under 1 V.S.A. § 317. If the Commission issues such an order, the data subject to the order shall be disclosed only in accordance with a protective agreement approved by the Commission and signed by the recipient of the data, unless a court directs otherwise.

(j) Evaluation; recommendation. On completion of the ESA Partnership Pilot, the Commission shall conduct or shall have a third party conduct an independent evaluation of the ESA Partnership Pilot.

(1) The evaluation shall analyze and compare, among pilot participants and companies of similar size outside the pilot: job creation and retention, energy savings, total energy cost reductions, energy

productivity measures, amount of capital applied and leveraged, greenhouse gas reductions, and other criteria as defined by the Commission. The evaluation shall also study the effects of the pilot on other ratepayers.

(2) The evaluation shall provide electric system results for the ESA Pilot Program and compare them to the electric system results that would have been obtained had the Customer EEC Funds been expended pursuant to the electric energy efficiency programs otherwise authorized under 30 V.S.A. § 209(d). In this subdivision (2), “electric system results” means: total electric energy savings, total avoided cost of purchasing power, total avoided costs of transmission and distribution improvements, and resulting FCM program revenues.

(3) After considering the results of that evaluation, the Commission shall submit a written recommendation to the standing committees of jurisdiction on whether to continue the program conducted under this section and, if so, under what recommended conditions and revisions, if any. The Commission shall submit this recommendation to the General Assembly on or before January 15, 2023.

Sec. 3. EFFECTIVE DATE

This act shall take effect on July 1, 2018.

Date Governor signed bill: May 21, 2018

Attachment B

Data Requirements

1. Information required for societal screening
 - a. Brief description of project
 - i. Equipment and process affected
 - ii. What is being changed and why
 - iii. Any expected changes in production levels with this project
 - b. Expected life of equipment or change
 - c. Estimated incremental cost
 - i. Installed cost of efficient measure
 - ii. Installed cost of baseline alternative
 - d. Annual Electric impact
 - i. Change in annual electric energy use (kWh savings or increase)
 - ii. Reduction in kW demand
 - iii. Loadshape
 1. Distribution of energy savings
 2. Average kW reduction during summer coincidence period
 3. Average kW reduction during winter coincidence period
 - iv. Expected changes over time (if any)
 - e. Annual Fuel impact
 - i. Fuel type(s)
 - ii. Change in fuel use (savings or increase) for each fuel type affected
 - iii. Expected changes over time (if any)
 - f. Annual Water impact
 - i. Change in water use (savings or increase)
 - ii. Expected changes over time (if any)
 - g. Operation and Maintenance cost impact
 - i. Annual or other periodic maintenance costs for baseline condition
 - ii. Annual or other periodic maintenance costs for efficient condition
 - h. Age of existing equipment (if being replaced)
2. Information required for economic impact analysis (in addition to screening information)
 - a. Expected impact on energy and water bills
 - i. Expected annual electric bill impact, including demand charges
 - ii. Expected annual fuel bill impact
 - iii. Expected annual water bill impact
 - b. Other impacts
 - i. Expected impact on jobs
 - ii. Expected impact on productivity
 - iii. Other expected benefits or costs

3. Information required for M&V (in addition to screening and economic information)
 - a. Brief description of the project.
 - i. What is the process being affected?
 - ii. What is being changed?
 - iii. Are you buying new (additional) equipment, replacing existing equipment, or making changes to how existing equipment operates?
 - iv. What is the goal of the project?
 - b. Description of Baseline Condition
 - i. Brief description of equipment and operation
 - ii. Operating conditions (hours of use, controls, etc.)
 - iii. Production – number of products, or other measure as relevant
 - c. Description of Efficient measure
 - i. Brief description of equipment and operation
 - ii. Model numbers and specifications of installed equipment
 - iii. Operating conditions (hours of use, controls, etc.)
 - iv. Production – number of products, or other measure as relevant
 - d. Savings analysis
 - i. Calculations of electric, fuel, and water impact, with inputs
 - ii. Basis of major inputs (hours, capacities, efficiencies, production levels, loads, etc.)
 - e. Documentation of installation (some combination of the following)
 - i. Detailed invoices, including model numbers
 - ii. Photos of equipment installed, including nameplates with model numbers
 - iii. Screenshots from control systems showing relevant settings and readings
 - f. Current usage
 - i. Copies of electric bills (if affected by project)
 1. for past 3 years if possible
 - ii. Fuel use (if affected by project)
 1. for past 3 years if possible
 2. preferably by month or delivery period
 - iii. Water use (if affected by project)
 1. for past 3 years if possible
 - iv. Any sub-metering data related to the equipment affected by the project
 - g. For larger projects (to be defined in Track 2 of PUC *Case No. 19-0302-INV*)
 - i. Pre-and Post- installation usage data on the equipment
 - ii. This may include sub-metering, interval, AMI, and/or records from control systems

