

# FY 25's Direct Fund Demonstration Project

**Rachelle Powers, BPA**

*October 24, 2024*



## Participation in FY23/FY24



**Total 1.93 aMW**

98 Applications  
Submitted

By 22  
Utilities

\$4.6M  
Distributed

Residential  
Commercial  
Industrial  
Agricultural

UES  
Custom  
Lighting Calculators

Low-Income

# Purpose

- › Potentially reduce the amount of EEI annual carryover across rate periods
- › Increase identification of energy conservation projects in small/rural utility service territories
- › Increase the identification of projects that may benefit disadvantaged communities or provide public services

# Funding

- › From Energy Efficiency's Infrastructure (not EEI)
- › Project completion:
  - › UES: June 30, 2025
  - › Custom Projects with M&V completed: July 1, 2025
- › Project Cap = \$250K/project (not per utility)
- › Project Eligibility:
  - › Any reportable measure or project that meets Implementation Manual requirements
  - › EEI will be fully utilized in rate period OR
  - › DFD will supplement EEI to complete project
- › Not eligible for performance pay

A scenic landscape featuring a calm lake reflecting the surrounding environment. In the background, there are mountains with a warm, golden glow, suggesting a sunset or sunrise. The foreground is dominated by tall, thin grasses. A white rectangular box is superimposed on the right side of the image, containing the text 'Application Review' in a bold, dark blue font.

# Application Review

# Section A

## A. APPLICANT INFORMATION

Utility Name

Address

Utility Approver & Title

Utility Point of Contact

City

Phone

Phone

State

Email

Email

Zip Code

# Section B

## B. PROJECT ELIGIBILITY

Choose one of the following:

- Utility anticipates fully utilizing its EEI funds this rate period (2024-2025) by September 30, 2025.
- Utility expects to combine EEI and Direct Fund Demonstration allocations to fully utilize its EEI this rate period

[Click here to view the EEI Allocation Worksheet](#)

I will continue completing the application.

None of the above applies. Add your explanation below and

# Section C – Part 1

## C. PROJECT PROPOSAL

**Energy Efficiency Project** is the installation or implementation one or more of the BPA approved conservation measures and/or custom project in accordance with BPA Measurement and Verification (M&V) protocols that is not otherwise required by law or regulation and results in energy savings at a facility located within BPA's service territory. For the purposes of this application, a project may represent multiple customers or sites when like-UES measures are bundled together.

**Unique Project Name (i.e. Main High School East Wing Hallway Lighting):**

**Reference Number(s):**

**Project Description (include goals, objectives, existing baseline and proposed conditions, etc.):**



# Section C – Part 2

**Facility/End-User Name (Enter multiple for bundled UES measures):**

**Facility (Building) Name and Address (Enter multiple for bundled UES measures):**

**Sector (check one):**

Agricultural

Commercial

Industrial

Residential

Utility Distribution

**Type of Project:**

UES

Custom

Calculated Savings (i.e. Lighting Calculator, Utility Distribution)

# Section C – Part 3

Will Measurement & Verification (M&V) for custom projects be completed by July 31, 2025?  Yes  No

Will the project be reported into BEETS by June 30, 2025?  Yes  No

Will the project be invoiced by July 31, 2025?  Yes  No

# Section D

## D. PROJECT PROPOSAL ENERGY SAVINGS

Enter estimated busbar kWh savings:

Enter calculations in support of project (BPA approved calculators and/or C1 forms are acceptable but not required)

# Section E & F

## E. ESTIMATED INCENTIVE

Is this incentive less than BPA's willingness to pay?  Yes  No

## F. DFD FUNDING REQUESTED

Funding	Amount
Expected Utility Payment to End User	0
EEI	0
<b>DFD Funding Requested</b>	<b>0</b>

# Section G

## G. Optional Advanced Financial Assistance Payment

The Direct Fund Demonstration funding opportunity allows for payment flexibility; please indicate if you would like to request an advanced financial assistance payment. If requesting an advanced financial assistance funding, identify the amount of advanced financial assistance funding requested. Advanced financial assistance payments are intended to aid projects that require upfront capital to complete. Final payments will be in accordance with final savings and EEI allocation status.

I request an advanced financial assistance payment. This request represents  % of funding request.

# Section H

## H. NON-ENERGY SAVINGS BENEFITS

Identify Benefits (Check all that apply):

Low-income or Disadvantaged communities       Public Facility

City or community owned business       Healthy, Safety Risk reduction       Other

Community Economic Benefit (i.e. water conservation in drought stricken area, pollution reduction)       Community

(Please explain):       Other

Provide quantitative and qualitative impact for each box checked:      Describe

# Section I

## I. APPLICANT CERTIFICATION AND SIGNATURE

My signature below indicates the following:

- I understand that fuel switching is not permissible under any BPA incentives or programs.
- I affirm that this project has not already been reported to BPA using EEI or Self-funding.
- All conservation measures installed meet the requirements of BPA's conservation standards found at <https://www.bpa.gov/-/media/Aep/customers-and-contractors/bfai-21-1-full-text-parts-1-8and-appendices.pdf>.
- I understand that BPA M&V protocols will be followed.
- I will ensure that BPA staff is provided access to the project site.
- I will provide additional project documentation upon request.
- I understand that changes to the proposal after BPA's acceptance may reduce the funding received.
- I understand that a separate funding agreement must be signed before receiving any funding for this project.
- The project installation associated with this application reported in BEETS by July 31, 2025 and invoiced before September 25, 2025.
- All the information in this application is true and accurate to the best of my knowledge.
- I am authorized to sign on behalf of the utility.

Applicant Printed Name

Applicant Title



# Scoring



# Evaluation Criteria

- › Is a Utility designated SRR?
- › Historically, has the utility used more than 95% of its EEI allocation within the rate period?
- › Can the project be completed by deadlines?
- › What are the acquisition costs (lower scores higher)?
- › Non-Energy Benefits
  - › Low Income, tribal and/or disadvantaged communities
  - › Public Facilities
  - › Minority/Women Owned Businesses
  - › Economic (i.e. water conservation, pollution reduction)

# Rating Tool

Is the utility a Small, Rural, Or Residential (SRR)?	Yes=1, No=0	25%
Did the utility spend 95% or more of its 2022-2023 rate period EEI?	Yes=1, No=0	15%
Will this project ensure full utilization of EEI, either already used or will be used by 9/30/2025?	Yes=1, No=0	15%
Is the utility self funding? If so what portion are they covering?	Yes=1, No=0	10%
Is the project under BPA's average portfolio \$/kWh?	See Comment	15%
Will the project be completed by deadlines?	Yes=1, No=0	10%
How many non-energy benefits will this project benefit?	Points based on the number indicated on the application	10%
	Total	0 100%

4 = <.20  
 3 = .20-.26  
 2 = .27-.35  
 1 = >.35



A scenic landscape featuring a calm lake in the middle ground, reflecting the surrounding environment. In the background, there are mountains with a warm, golden-brown hue, suggesting a sunset or sunrise. The foreground is dominated by tall, thin grasses, some of which are in sharp focus. The overall atmosphere is peaceful and natural.

# Using BEETS

# BEETS

- › Utilities will enter application into BEETS
  - › Naming convention: FY25 DFD (Project Title)
- › BPA staff will check the DFD funding box
- › For Custom Projects/Lighting Calculators
  - › Utility or BPA staff will attach countersigned agreement and modifications to the application

# BEETS

## › For UES

- › Enter DFD agreement # in Column T0 (previously for PTCS) of each DFD line item

ROW NUMBER	PROJECT NAME	EEI PERC
000	May 2022 Upload	10
001	FY24 DFD2.2 St. Vincent de Paul – LIEE DHP	10
002	FY24 DFD2.2 St. Vincent de Paul – LIEE DHP	10
003	FY24 DFD2.2 St. Vincent de Paul – LIEE DHP	10

REQUIRED FOR PTCS
PTCS REGISTRY MEASURE ID
586394
24ES-11755

# BEETS

- › Once uploaded, BPA will attach the fully countersigned agreement on Application #1 of the upload(Line 1 of UES template). Every application in that upload will have the Agreement number in PTCS field so on upload it will be clear which application to find it in.
- › EERs will put the application number that includes the signed agreement in the tracking spreadsheet

# Project Timeline

## Solicitation Window

- September 20-November 1<sup>st</sup> (11:59pm PST)
- Energy Efficiency Representatives support customer communication

## Project Selection

- November: Project selection team reviews applications
- Agreements issued
- December, agreements signed
- If applicable, advanced payments made

## Project Completion

- June 30, 2025 (11:59pm PST) UES completed and submitted in BEETS
- July 31, 2025: Custom Projects completed (with M&V complete) and submitted in BEETS
- July 31, 2025: Invoices due
- August: Final Payments issued

A scenic landscape featuring a calm lake reflecting the surrounding environment. In the foreground, tall, golden-brown grasses are in sharp focus. The background shows a range of mountains under a clear sky, with some trees visible on the slopes. A white rectangular box is superimposed over the center of the image, containing the text "Questions?".

**Questions?**



# Contact

---

**BPA EERs or**

Rachelle Powers, Business Analyst | Energy Efficiency, BPA

[rapowers@bpa.gov](mailto:rapowers@bpa.gov)

