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October 2023 Implementation Manual Changes

General, Commercial, Industrial, Utility Distribution

08/10/2023



General IM

Corinne Mauck, Implementation Manual Coordinator

Changes: Non-Sector Chapters

- **Overall**
 - Reformatting of tables and removal of sidebar content
- **1. Introduction**
 - 1.7 COTR Request and Acknowledgement Procedure: Removed the Green Motors Rewind Initiative from the enrollment examples.
- **2. BPA Funding**
 - Reorganized sections for readability and clarity.
- **3. General Requirements**
 - Corrected minor typos and grammar errors.
 - Added section 3.6 Hemp and Marijuana to reflect BPA policy:
 - Hemp and associated load is allowed to participate in the BPA EE program.
 - BPA will not provide funding or support for measures or projects involving marijuana-related business load.
 - BPA will allow customers to report self-funded marijuana related activities that meet the rules and requirements of the Implementation Manual.

Changes: Non-Sector Chapters

- **4. Custom Projects**
 - Updated this section’s language throughout to align with other IM sections and clarify custom project requirements.
 - Also updated section 4.1 Custom Project Payment Rate (table) to increase specific payment rates.

PROJECT TYPE	MEASURE LIFE (YEARS)	SECTOR	PAYMENT RATE (\$/KWH)
NONRESIDENTIAL LIGHTING	ALL	AGRICULTURAL, COMMERCIAL, INDUSTRIAL	\$0.13
NEW OR RETROFIT CONSTRUCTION, MAJOR RENOVATION (EXCLUDING NONRESIDENTIAL LIGHTING)	1	ALL	\$0.025
	2-3	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL	\$0.06
	4-19	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL, UTILITY DISTRIBUTION	\$0.33
		WHOLE BUILDING NEW CONSTRUCTION COMMERCIAL, INDUSTRIAL	\$0.35
	20+	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL, UTILITY DISTRIBUTION	\$0.38
NEW CONSTRUCTION	45+	RESIDENTIAL	\$0.45

Changes: Non-Sector Chapters

- **5. Custom Programs**
 - Updated this section’s language to align, where applicable, with section 4. Custom Projects
 - Also updated section 5.1 Custom Programs Payment Rate (table) to increase specific payment rates to similar to section 4.1 Custom Project Payment Rate (table).

PROJECT TYPE	MEASURE LIFE (YEARS)	SECTOR	PAYMENT RATE (\$/KWH)
NONRESIDENTIAL LIGHTING	ALL	AGRICULTURAL, COMMERCIAL, INDUSTRIAL	\$0.13
NEW OR RETROFIT CONSTRUCTION, MAJOR RENOVATION (EXCLUDING NONRESIDENTIAL LIGHTING)	1	ALL	\$0.025
	2-3	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL	\$0.06
	4-19	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL, UTILITY DISTRIBUTION	\$0.33
		WHOLE BUILDING NEW CONSTRUCTION COMMERCIAL, INDUSTRIAL	\$0.35
	20+	AGRICULTURAL, COMMERCIAL, INDUSTRIAL, RESIDENTIAL, UTILITY DISTRIBUTION	\$0.38
NEW CONSTRUCTION	45+	RESIDENTIAL	\$0.45

Changes: Intro to Sectors

- **6.2 Measure Distribution Channels**

- BPA corrected the Measure Delivery Channel (table) language to better differentiate who the term 'customer' applies to, i.e., BPA customer or end-user.
- Added language to refer reader to the table in 6.2 for verification requirements when using the direct install delivery channel.
- BPA updated the Documentation Requirements by Channel (table) "End-user Identifying Information (Required in BEETS)" column to say "May Be Required in BEETS."
 - Not all measures have the same end-user identification information requirements in BEETS for each delivery channel.

Changes: Intro to Sectors, cont'd

DOCUMENTATION REQUIRED*						
DISTRIBUTION CHANNEL	METHODOLOGY ALLOCATING SAVINGS	END-USER IDENTIFYING INFORMATION (MAY BE REQUIRED IN BEETS)*	DOCUMENTATION OF REQUEST	SALES REPORT	EQUIPMENT/ CONTRACTOR INVOICE	DOCUMENTATION OF MAILING
Retail	X			X		
By Request		X	X		X	X (when distributed by mail)
Direct Install		X			X	
Coupon or Instant Rebate		X		X		
Standard Rebate Payment		X			X	

*Additional requirements may apply and will be listed in the body of the IM for each measure category.

Questions?

Commercial

Eric Mullendore, Commercial & Industrial Sector Lead



Measure Expirations

These measures **expire on September 30, 2023:**

- Air-Source Heat Pump Retrofit and Upgrade**
- Electric Commercial Steam Cookers
- Hot Food Holding Cabinets
- Electric Combination Ovens
- Electric Convection Ovens
- Pre-Rinse Spray Valves
- Smart Power Strips
- ENERGY STAR® Commercial Clothes Washers
- **Tier 1 and Tier 2 unit levels** (only) for Consumer Heat Pump Water Heater in Commercial Applications (*formerly called Commercial Heat Pump Water Heater*)

**Replaced with a new similarly named measure

Measure Changes: Savings

- **8.4.3 Ductless Heat Pump Retrofit and Upgrade (BPA-Qualified)**
 - DHP Retrofit: Savings ↓ 36.5%
 - DHP Upgrade: Savings ↑ 3%
- **8.5.1 Commercial Insulation**
 - Savings ↑ btwn 3-79%
- **8.5.2 Commercial Windows (BPA-Qualified)**
 - Savings ↑ btwn 29-59%
- **8.7.3 Consumer Heat Pump Water Heater in Commercial Applications**
 - Tier 3 – Savings ↑ btwn 6-10.5%
 - Split-System – Savings ↑ $\leq 1\%$

See the UES Measures List for more details.

Changes and Corrections

- **8.1 Payment Summary**

- Updated the Commercial Payment Summary (table) to list the current measures and correct payment amounts.

- **8.3 Nonresidential Lighting**

- Added a new section to allow for a separation between Lighting Calculators and Midstream Lighting measures.

- **8.3.1 Lighting Calculators**

- Renumbered the Lighting Calculator measure and replaced the term "retirement" with "expiration."
- Updated the Lighting Calculator Effective Date/Expiration Date (table) added LC5.1 expiration date and the new Lighting Calculator Series 6 with new calc details.

LIGHTING CALCULATOR SERIES NAME	CALC. VERSION	EFFECTIVE DATE	EXPIRATION DATE*
LIGHTING CALCULATOR SERIES 5	LC 5.1	October 1, 2020	March 31, 2024
LIGHTING CALCULATOR SERIES 6	LC 6.0	October 1, 2023	TBD

Changes and Corrections, cont'd

- **8.3.1.C Retrofit Projects for Existing Buildings**
 - Clarified details about fixtures with Network Lighting Controls.
- **8.4.3 Ductless Heat Pump Retrofit and Upgrade (BPA-Qualified)**
 - Adjusted the Basis for Energy Savings language for clarity, updated DHP Upgrade pre-conditions and DHP Retrofit post-conditions.
- **8.4.5 Variable Refrigerant Flow System Retrofit (BPA-Qualified)**
 - Removed requirements for cooling and low-temp heating performance metrics.
- **8.4.8 Demand-Controlled Kitchen Ventilation**
 - Moved this measure to Commercial HVAC and renumbered.
- **8.7.3 Consumer Heat Pump Water Heater in Commercial Applications**
 - Updated the measure title.

Payment Change: Commercial HVAC

- **8.4.1 Advanced Rooftop Unit Control: Increased payments**

MEASURE CATEGORY	PAYMENT PER TON
ARC Retrofit – Lite	\$120
ARC Retrofit – Full	\$250

Payment Change: Commercial Shell

- 8.5.1 Commercial Insulation: Increased payments

MEASURE CATEGORY	PAYMENT PER SQUARE FOOT		
LOCATION AND R VALUE	HEATING ZONE 1	HEATING ZONE 2	HEATING ZONE 3
Attic/roof insulation:			
≤R-5 to R-19	\$1.75	\$2.00	\$2.50
≤R-5 to R-30	\$1.80	\$2.10	\$2.60
≤R-5 to R-49	\$1.90	\$2.20	\$2.80
Wall insulation:			
≤R-5 to R-11	\$0.80	\$1.10	\$1.20
≤R-5 to R-19	\$1.10	\$1.40	\$1.50

Payment Change: Water Heaters

- **8.7.3 Consumer Heat Pump Water Heater in Commercial Applications:** Increased payments

MEASURE CATEGORY	PAYMENT PER HPWH
Unitary Heat Pump Water Heater Tier 3 - Any size tank	\$800
Split-System Heat Pump Water Heater– Any size tank	\$1,100

Updated and New Calculators

- **Nonresidential Lighting Calculator 6.0**
 - Offers distinct incentives for Type A LED Tubes (\$2/lamp) and Type B or C LED Tubes (\$8/lamp).
 - Increased incentives for Networked Lighting Control measures.
 - Networked Lighting Control savings now contribute to incentives for calculated measures.
 - Updated busbar and B/C ratio calculations align with 2021 Power Plan.
- **Efficient Pumps Calculator**
 - Calculates the savings amount to manually enter into the UES Measure Upload Template in BEETS.
- **Refrigeration Controls Calculator**
 - Calculates the savings amount to manually enter into the UES Measure Upload Template in BEETS.

New Measure: Nonresidential Lighting

- **8.3.2 Midstream Lighting** – These are efficient lamps and linear retrofit kits sold through lighting distributors and installed at nonresidential sites.
 - **Key Requirements:** Customers will use the UES Measure Upload Template to report and must include the installation site address for each type and quantity of lamps.
 - **Payment:**

MEASURE CATEGORY	PAYMENT PER LAMP
T8 Replacement: 2 foot, Type A	\$1
T8 Replacement: 2 foot, Type A+B, Type B, Type C, Linear Kit	\$2
T8 Replacement: 4 or 8 foot, Type A	\$2
T8 Replacement: 4 or 8 foot, Type A+B, Type B, Type C, Linear Kit	\$4
T8 HO Replacement: 8 foot, Type A	\$6
T8 HO Replacement: 8 foot, Type A+B, Type B, Type C, Linear Kit	\$8
T5 Replacement: 4 foot	\$4
T5 HO Replacement: 4 foot	\$6
HID Replacement: $\leq 60W$	\$20
HID Replacement: $\geq 60W$	\$50

New Measure: Commercial HVAC

- **8.4.4 Air-Source Heat Pump (ASHP) Retrofit and Upgrade (BPA-Qualified)**

- **Key Requirements:**

- ASHP Retrofit - Pre-conditions the space is conditioned by a permanently installed system with zonal or forced-air, electric-resistance heat as the primary heating source. No other heating sources are eligible.
- ASHP Upgrade - Pre-conditions may be used for any project where the post-conditions are met, including: new construction/major renovation, retrofits replacing existing heat pumps or replacing equipment using a non-electric fuel source, and retrofits that qualify for the ASHP Retrofit measure.

Projects may be able to claim both the ASHP Upgrade and ASHP Retrofit, if all pre- and post-conditions are met.

- ASHP Retrofit - Post-conditions each installed ASHP must be an air-to-air heat pump and have an AHRI certificate of product rating.
- ASHP Upgrade - Post-conditions each installed ASHP must be an air-to-air heat pump, have an AHRI certificate of product rating, and meet BPA's efficiency requirements, see Section 8.4.4 for more details.

New Measure: 8.4.4 ASHP, cont'd

EQUIPMENT SIZE (COOLING CAPACITY; BTU/H)	MODE	SUB-CATEGORY OR RATING CONDITION	EFFICIENCY REQUIREMENT
<65,000	Heating	Split-System	8.1 HSPF2
		Single Package	7.0 HSPF2
≥65,000 and <135,000	Heating	47°F db/43°F wb Outdoor Air	3.5 COP
≥135,000 and <240,000	Heating	47°F db/43°F wb Outdoor Air	3.4 COP
≥240,000	Heating	47°F db/43°F wb Outdoor Air	3.4 COP

○ **Payment:**

MEASURE CATEGORY	PAYMENT PER TON
Air-Source Heat Pump – Retrofit	\$700
Air-Source Heat Pump – Upgrade	\$150

New Measure: HVAC cont'd

- **8.4.9 Heat Recovery Ventilation Equipment (BPA-Qualified)**
 - **Key Requirements:** Applies to retrofit, new construction or major renovation (except HRV Upgrade projects in Washington State are not eligible, due to code requirements). Heat Recovery or Energy Recovery units are applicable, so long as the equipment's sensible heat recovery portion meets or exceeds the Sensible Rated Effectiveness (SRE) of the specified tier.
 - HRV Retrofit - Pre-conditions the space is conditioned by an operational or failed heat pump, or electric-resistance heater as the primary heating source without a heat recovery device installed. Existing system is currently designed to provide ventilation air.
 - HRV Upgrade - Pre-conditions the space is part of a building addition, new construction or major renovation project (i.e., baseboard electric-resistance heating to VRF with ventilation, etc.). Projects completed in Washington State are not eligible, due to code requirements.
 - **Payment:**

MEASURE CATEGORY	PAYMENT PER CFM
Tier 1 unit with $\geq 70\%$ SRE	\$2.00
Tier 2 unit with $\geq 82\%$ SRE	\$3.50

New Measure: Commercial Shell

- **8.5.3 Secondary Windows**– Interior window inserts, secondary glazing system or window retrofit panels which do not require existing glass or window frame replacement and generally do not alter window aesthetics or exterior appearance of the building.
 - **Key Requirements:**
 - Pre-conditions existing windows must be single-pane glass; building’s primary heat source must be electric (e.g., zonal, VAV with electric reheat, or heat pump).
 - Post-conditions all qualifying products must be permanently installed and non-operable; however, they may be removed temporarily to clean in-between the inner glazing panel and window.
 - Have an overall solar heat gain coefficient of 0.55 or less when added to existing ¼-inch thick clear glass window, and
 - Have a center-of-glass U-factor less than or equal to 0.20

- **Payment:**

MEASURE CATEGORY	PAYMENT PER SQUARE FOOT
Secondary Windows	\$3.00

New Measure: Commercial Refrigeration

- **8.6.4 Refrigeration Floating Pressure Controls (BPA-Qualified)** – Adding advanced controls to an existing commercial refrigeration system.

- **Key Requirements:**

- Applies to retrofits to multiplex refrigeration systems only.
- Existing system must have fixed set-points.
- Requires Refrigeration Schedule and the new Refrigeration Controls Calculator to determine the energy savings.
- Savings will be manually entered in to the UES Measure Upload Template and uploaded into BEETS along with electronic copies for program oversight.
- Units are evaporator design load (MBH)

- **Payment:**

MEASURE CATEGORY	PAYMENT PER MBH
Floating Head Pressure Control	\$20
Floating Suction Pressure Control	\$10

New Measure: Commercial Refrigeration

- **8.6.5 Refrigerated Display Case Door Retrofit** – Adding doors to existing open display cases.

- **Key Requirements:**

- Existing display case must be open (i.e., not have doors)
- Existing display case must be served by a remote refrigeration system (i.e., not self-contained)
- Doors must be double- or triple-pane glass

- **Payment:**

MEASURE CATEGORY	PAYMENT (CASE) PER LINEAR FOOT
Vertical Display Case Door Retrofit	\$300
Horizontal Display Case Door Retrofit	\$100

New Measures – Heat Pump Water Heaters

- **8.7.3 Consumer Heat Pump Water Heater in Commercial Applications**
 - Added new unit level and payment.

MEASURE CATEGORY	PAYMENT PER HPWH
Unitary HPWH Tier 4 – Any size tank	\$900

- **8.7.4 Commercial Unitary Heat Pump Water Heater**
 - **Key Requirements:** This measure applies to units classified by federal regulations as unitary, commercial water heaters. ENERGY STAR certified as per requirements in the Commercial Water Heaters Version 2.0 or later.
 - **Payment:**

MEASURE CATEGORY	PAYMENT PER HPWH
Commercial Unitary HPWH	\$2,000

New Measures: Pumps

- **8.7.5 Efficient Pumps (BPA-Qualified)**

- **Key Requirements:**

- This measure applies to both commercial and industrial retrofit and new construction.
- Each efficient pump must be submitted as an individual project (i.e., pumps may not be combined or divided).
- Requires a specification sheet with PEI rating and the new Efficient Pumps Calculator to determine the energy savings and incentives.
- Savings and incentives will be manually entered into the UES Measure Upload Template and uploaded into BEETS along with electronic copies for program oversight.

- **Payment:**

MEASURE CATEGORY	PAYMENT PER KWH
Efficient Pumps	\$0.33

New Measure: VFDs on Pumps

- **8.7.6 Variable Frequency Drive (VFD) for Pumps (BPA-Qualified)**

- **Key Requirements:**

- This measure applies to both commercial and industrial retrofit and new construction.
- Utilities will report this measure to the applicable sector when reporting to BPA.
- Pre-conditions: Building/facility heating fuel source may be either electric or gas. Existing VFD must be installed on a commercial or industrial single-speed pump that is less than 100 hp. The system can be either a constant or variable load.
- Post-conditions: The retrofit adds a VFD to control the pump with variable-speed operation. Any existing pump throttling (i.e., flow control valve, etc.) or bypass devices (i.e., 3-way valve, etc.) must be removed or permanently disabled.

- **Payment:**

MEASURE CATEGORY	PAYMENT PER HORSEPOWER
Variable Frequency Drive for Pumps	\$180

Questions?

Industrial

Eric Mullendore, Commercial & Industrial Sector Lead



Measure Expirations

These measures **expire on September 30, 2023:**

- High Frequency Battery Charger Upgrade (BPA-Qualified)
- Welder Upgrade (BPA-Qualified)

Corrections

- **10.1 Payment Summary:** Updated the Industrial Payment Summary (table) to list the current measures and correct payment amounts.
- **10.3.1 Energy Project Manager:** Updated the Payment (table) to include the option for utility-specified cap.

MEASURE CATEGORY	PAYMENT LESSER OF PER RATE PERIOD
Energy Project Manager	\$0.025 per kWh of Verified Busbar Savings, \$150,000 per site, or a utility-specified cap.

- **10.3.2 Strategic Energy Management:** Added a new section to separate the two SEM measures.

Corrections, cont'd

- **10.3.2.1 Strategic Energy Management Legacy:**

- Added the term “Legacy” to the existing SEM measure title to make a separation.
- Updated the Requirements and Specifications section to bring more clarity.
- Updated the Payment (table) to include the option for utility-specified cap.

MEASURE CATEGORY	PAYMENT LESSER OF
Strategic Energy Management Legacy	\$0.025 per kWh of SEM Verified Busbar Savings or utility-specified cap

- **10.3.3 Performance Tracking System:**

- Updated the Payment (table) text for both PTS Installation and PTS Maintenance to include the option for utility-specified cap.

MEASURE CATEGORY	PAYMENT LESSER OF
Performance Tracking System	Initial installation: Lesser of PTS costs, \$15,000, or utility-specified cap. Annual maintenance: Lesser of PTS costs, \$10,000, or utility-specified cap, per two-year performance period.

Corrections, cont'd

- **10.4 Other Industrial Measures:** Added the new section and renumbered the measures.
- **10.4.2 Small Compressed Air:**
 - Increased horsepower threshold to 150 hp
 - Added these other eligible project measures:
 - New Compressor (rotary screw oil-flooded or part of a single compressor system)
 - Permanent demand reduction
 - Permanent pressure reduction
 - New receiver (minimum volume of 3 gallons/scfm)
 - New efficient air dryer (refrigerator cycling or desiccant dryer that is heat or blower purged)
- **10.4.4 BPA-Funded Green Motors Rewind Initiative:** Updated the text to reflect that it is a BPA-funded, direct acquisition program.

Payment Changes

Updated incentives to align with new custom project incentive rates:

MEASURE CATEGORY	PAYMENT LESSER OF
Small Compressed Air Systems	\$0.33 per kWh or 70% of the project cost.
Water System Leak Abatement	\$0.33 per kWh or 70% of the project cost.

Updated and New Calculators

- **Updated SEM Calculator**

- Updated version replaces the existing calculator.
- Calculates the savings and incentive amounts for either SEM Legacy or Multiyear SEM annual activities to be manually enter into the SEM Program in BEETS.
- Includes incentives for Industrial and Commercial sector SEM Legacy and Multiyear SEM projects.

- **Small Compressed Air Calculator**

- Calculates the savings and incentive amounts to manually enter into the Compressed Air Program in BEETS.
- Includes increased horsepower threshold and types of eligible compressed air project measures.

New Measures

- **10.3.2.2 Multiyear Strategic Energy Management:** Added new SEM measure that provides increased payment rates because of the increased measure life. It has some similarities with the existing Strategic Energy Management Legacy measure.

- **Key Requirements:**

- This measure is available to both commercial and industrial sectors and has a two-year performance period.
- Energy savings is based on SEM Annual Savings, which in Year-1 is all savings achieved against the baseline; for Year-2 and beyond, the savings achieved are the year-to-year changes in SEM Cumulative Verified savings reported from the previous year’s energy savings.
- SEM Annual Savings is used to determine the incentive payment.

- **Payment:**

MEASURE CATEGORY	PAYMENT LESSER OF
Multiyear Strategic Energy Management	\$0.04 per kWh of SEM Annual Busbar Savings or utility-specified cap (Industrial). \$0.08 per kWh of SEM Annual Busbar Savings or utility-specified cap (Commercial).

Questions?

Utility Distribution

Eric Mullendore Commercial & Industrial Sector Lead



Payment Changes

- **12.1 Utility Distribution Custom Project Program:** increased payment rates to align with changes made to Section 4. Custom Projects.

MEASURE CATEGORY	PAYMENT
Utility Distribution Custom Project Program (4-19 year measure life)	Lesser of \$0.33 per kWh or 70% of project cost
Utility Distribution Custom Project Program (20+ year measure life)	Lesser of \$0.38 per kWh or 70% of project cost

- **12.2 Re-conductor & Transformer Program:** increased payment rates to align with changes made to Section 4. Custom Projects.
 - Updated the RT Calculator with the increased payment rates.

MEASURE CATEGORY	PAYMENT
Re-Conductor & Transformer Program (4-19 year measure life)	Lesser of \$0.33 per kWh or 70% of project cost
Re-Conductor & Transformer Program (20+ year measure life)	Lesser of \$0.38 per kWh or 70% of project cost

Questions?

Definitions Updates

Mike Gross, Marketing Lead

Definition Update

- **Busbar Energy Savings:** Updated the site-to-busbar savings factor

“Energy that did not have to be produced at the generator (e.g., the site energy savings, plus any transmission and distribution losses that would have occurred had the energy been generated). The site and busbar relationship depends upon the particular measure being implemented and its associated load shape. For UES measures, the site-to-busbar savings factor varies by measure **and is reflected in the current BPA UES Measures List**. For site-specific calculators, site-to-busbar savings factor currently in use is **1.11183**, with exception to current versions of the BPA lighting calculators** (see 8.3 Nonresidential Lighting) which use 1.07478 or **1.10816**. BPA provides payment for energy savings calculated from the busbar.”

***LC 5.1 uses 1.07478 and LC 6.0 uses 1.10816.*

Definition Corrections

Removed these terms and definitions to eliminate confusion caused by the different meanings that exist between the two Strategic Energy Management measures:

- **SEM Annual Savings Achieved**
- **SEM Baseline**
- **SEM Cumulative Verified Savings**
- **SEM Participant Payment**
- **SEM Verified Savings**

These terms and definitions are located in the BPA Commercial and Industrial Strategic Energy Management Measurement and Verification Reference Guide's Glossary.

Corrections, cont'd

- **Single-Family:** Adjusted the definition for what qualifies as a single-family home by removing the term townhouse.
- **Townhouse:** Removed this term and definition. There are no references to this term in the IM.

These corrections bring clarity to the Residential sector and eliminates confusion.

New Definition and Acronym

- **Agent:** Added the new definition

“A person or entity designated to work on behalf of the customer.”

- **MBH:** Added the new acronym and definition

“It is the equivalent of 1,000 BTU per hour and is a unit of measure to calculate the heating/cooling capacity of air conditioning and refrigeration equipment.”

This new term is associated with the new Commercial Sector measure, Refrigeration Floating Pressure Control (see section 8.6.4).

Questions?

Thank you for your time

Coming Soon:

<https://www.bpa.gov/energy-and-services/efficiency/implementation-manual>

9/1/2023

