

**[PG&E Logo to be added 12/1]**

Business Energy Performance Program

Program Manual

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# Program Manual Summary

The Business Energy Performance (“BEP”) Program (“Program”) will provide energy efficiency services, technical assistance and incentives to the industrial sector within the Pacific Gas and Electric (“PG&E”) service territory. The Program will target the Petroleum, Chemical, and Minerals sub segments using a downstream market approach and leveraging the Deemed and Custom savings platforms to deliver cost-effective energy savings. The Program will also promote and leverage on-bill financing (“OBF”) as a tool to off-set the barrier of capital to fund projects.

The primary objectives informing the program design are:

* Increase the cost-effective savings achieved in the industrial sector
* Support long-term energy efficiency planning and continued customer engagement to maximize savings delivery

# 1. Eligible Measures or Measure Eligibility

Measures will be delivered through either deemed, custom, or BRO-RCx platforms.

* Process Equipment:
  + Heat Recovery
  + Process Controls
  + Process Optimization
  + Insulation
  + Variable Frequency Drives (‘VFD”)
* Pumping:
  + VFDs on Well Pump
  + VFDs on Booster Pump
  + Pump Upgrades
* Refrigeration:
  + Refrigeration Controls
  + Evaporator Upgrades
  + VFD on Condenser
* Steam Systems:
  + Boiler Controls
  + Economizer
  + Blow Down Heat Recovery
  + Flash Steam Recovery
  + Insulation
  + Boiler Upgrade
  + Condensate Return
  + Reverse Osmosis (RO) for boiler water
* Compressed Air:
  + Pressure Drop Reduction
  + Compressor Sequencing
* Lighting:
  + Lighting Upgrades
  + Lighting Controls
* Other:
  + High efficiency ventilation fans and controls
  + Thermal Oxidizer

# 2. Customer Eligibility Requirements

**Eligible Customers**

The Program will comply with the California Public Utility Commission’s (CPUC) Statewide Customized Offering Procedures Manual for Business found and updated on the CPUC website, or here:

<https://www.pge.com/pge_global/common/pdfs/save-energy-money/facility-improvements/custom-retrofit/Customized-Policy-Procedure-Manual_2019.pdf>

Projects are subject to all applicable federal, state and local laws, and California Public Utilities Commission (CPUC) rulings. BEP reserves the right to approve or reject project applications for the Program.”

Customers must be an established electric or natural gas Customer of PG&E with an active meter serviced by PG&E and paying the Public Purpose Program Charge. Eligible customers conduct business under a NAICS Code included below which broadly covers all sites that include Oil & Gas Extraction, Mining, Petroleum & Coal Manufacturing, Pipeline Transportation, and Chemical Manufacturing, however exceptions are permitted through a program participation exception.

Program participation exceptions are permitted for special cases requested through the PG&E Program Manager and may occur due to incorrect NAICS code assignment, customer/ES&S request for service consistency or positive cost effectiveness of services compared to other parts of the PG&E portfolio.

**NAICS Code**

Customers throughout PG&E’s Service Territory with the following North American Industry Classification System (NAICS) codes are eligible:

|  |  |
| --- | --- |
| **NAICS Code** | **Description of Customer Segment** |
| 211 | Oil & Gas Extraction |
| 212 | Mining |
| 324 | Petroleum & Coal Manufacturing |
| 486 | Pipeline Transportation |
| 325 | Chemical Manufacturing |

**Eligible Geographic Area**

The BEP Program is available in all PG&E’s Service Territory with no geographic restrictions however program services are offered at the discretion of the program based on its ability to remain cost effective.

**Application Must be Complete**

A program application must be signed and dated. In addition to customer and site information, a completed application package must include a savings summary that identifies the following for each proposed measure:

1. Code/ISP baseline
2. For Early Retirement claims: Documentation to support a preponderance of evidence for the use of existing equipment baselines
3. Estimated full measure cost and incremental measure cost
4. Preliminary savings calculations
5. Preliminary incentive payment estimates
6. A proposed M&V plan

**Non-IOU Supply**

Evaluation requires assessment of “coincident savings”, which are savings associated with an energy efficiency measure that coincide with the period(s) the customer is purchasing energy from PG&E or BEP, thus reducing the grid/system impact. The time period is hourly for electricity and monthly for natural gas.

Eligibility is determined based on two factors:

1. Does the customer pay the non-bypassable Public Purpose Program (PPP) surcharge on the electricity or gas subject to energy efficiency savings?
2. Are there electric grid/gas system coincident savings?

To qualify for energy efficiency incentives, the customer’s reduction in energy usage due to the energy efficiency measure, must always occur on the grid/system at times when the energy efficiency measure is operational, and its energy resource requirement is being met.

**Minimum Customer or Project Size**

Currently, there are no incentive size limitations or usage threshold requirements to qualify for Program participation.

**Double Dipping**

The Program team will work with the customer to validate that it has not received incentives or services for the same energy efficiency technologies and measures that it is applying for with the program.

The customer Program Application provides the following statements that each participating Customer will validate:

* Customer understands that Customer cannot receive incentives for the same product, equipment or service from more than one California investor-owned utility or third-party Energy Efficiency program offering incentives for the same product, equipment, or service funded by the CPUC.
* Customer understands this prohibition applies three years prior to and three years after receiving the incentives for the same product, equipment or service.

# 3. Contractor Eligibility Requirements

The Program will operate in compliance with the workforce qualifications, certifications, standards and requirements set forth by the Workforce Standards as required by Decision 18-10-008. Customers will be notified of the workforce standard during initial engagement in the program. Customers will be required to accept understanding of the workforce standards on the enrollment agreement prior to ordering and installation of equipment. Customer will also verify that workforce standards were met as part of the project completion certificate that will be signed upon project completion. The workforce standards are described below.

1. HVAC STANDARDS. For any non-residential project pursuant to this Agreement installing, modifying or maintaining a Heating Ventilation and Air Conditioning (“HVAC”) system or component with incentives valued at $3,000 or more, Implementer shall ensure that each worker or technician involved in the project, including all employees and agents of its subcontractors, meets at least one of the following workforce criteria:
2. Completed an accredited HVAC apprenticeship;
3. Is enrolled in an accredited HVAC apprenticeship;
4. Completed at least five years of work experience at the journey level as defined by the California Department of Industrial Relations, Title 8, Section 205, of the California Code of Regulations, passed a practical and written HVAC system installation competency test, and received credentialed training specific to the installation of the technology being installed; or
5. Has a C-20 HVAC contractor license issued by the California Contractor’s State Licensing Board.

This standard shall not apply where the incentive is paid to any manufacturer, distributor, or retailer of HVAC equipment, unless the manufacturer, distributor, or retailer installs or contracts for the installation of the equipment.

1. ADVANCED LIGHTING CONTROLS STANDARDS. For any non-residential project involving installation, modification, or maintenance of lighting controls with incentives valued at $2,000 or more, Implementer shall ensure that all workers or technicians involved in the project, including those of its subcontractors are certified by the California Advanced Lighting Controls Training Program (“CALTP”). This requirement shall not apply where the incentive is paid to a manufacturer, distributor, or retailer of lighting controls unless the manufacturer, distributor, or retailer installs or contracts for installation of the equipment.

# 4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

Not applicable

# 5. Additional Services

No additional services

# 6. Audits

Representatives from CLEAResult’s Engineering & Quality Assurance (QA) / Policy team will work closely with direct customer contacts on our program team to outline appropriate measure and baseline information and formulate cohesive strategies and scheduling for projects requiring M&V plans, data, or monitoring. Clear standards and project scoping workbooks ensure consistent and comprehensive data capture during on-site scoping audits.

Facility assessments and scoping audits, either in-person or virtual as conditions dictate and performed by a CLEAResult team member or partner with the appropriate clearances, will be tailored to the participant’s business needs, building characteristics and existing energy efficiency knowledge. Data gathered during these assessments allow CLEAResult to confirm recommended project potential, identify the appropriate incentive or energy management track, and increase program influence.

# 7. Sub-Program Quality Assurance Provisions

CLEAResult representatives utilize standardized tools to facilitate clear customer or industry standard practice documentation. To proactively maintain a high level of quality, savings accuracy data and methodologies are tracked, and in-field verification of installation and post-M&V results are confirmed as part of the QA process.

Prior to a narrative or project package submittal to the utility, CLEAResult’s Engineering QA / Policy team reviews measure categories, baseline methodologies, influence documentation, M&V plan, calculation approach, and savings estimates/results to ensure proper documentation and calculation techniques have been employed. The language in the custom project narratives is appraised for clarity. During the post-installation phase, evaluations are performed to verify measures were installed as scoped, and to confirm continued adherence to applicable policy and regulatory rules. Internal checklists guarantee the use of uniform nomenclature and consistent packaging of pertinent project documentation

# 8. Other Program Metrics

The program will be assessed by several measurable key performance indicators. These include the following:

* Savings Goal Attainment
* Cost Effectiveness
* Program Data Quality
* Savings Forecast Accuracy
* Engineering Quality
* Measure Installation Pass Rate
* Customer Satisfaction
* Pipeline Quality
* Grid Resource

Data supporting the measurement and evaluation of these parameters will be stored in PG&E’s Energy Insight platform.