

Efficiency Maine  
Commercial and Industrial (C&I) Custom Program

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Technical Assistance Program

# Agenda

- Purpose of Technical Assistance (TA) incentives
- Eligibility Criteria
- TA Incentive Funding
- Deliverable Requirements
- Process
- Summary of TA Program Results
- Become a TA Provider

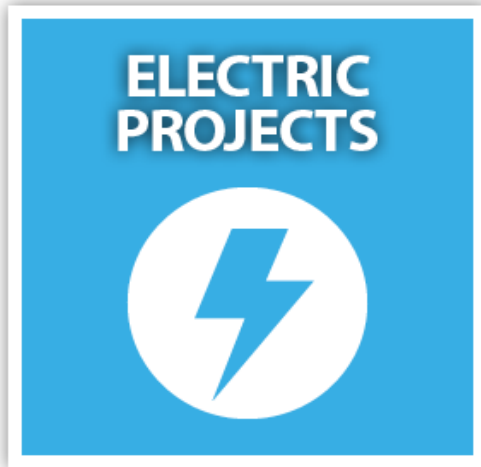
# Purpose of TA Incentives

- Scoping audits and feasibility assessments suggest many opportunities for economically attractive, incentive-eligible projects.
- For many large and/or complex measures, additional investment-grade analysis of the cost and energy impacts is necessary to confirm incentive eligibility and inform implementation decisions.
- The cost of this analysis often represents a barrier to implementation.
- TA incentives are intended to overcome this barrier by sharing the cost of this investment-grade analysis.

# TA Incentive Eligibility Criteria

- Project measures must be clearly defined and have undergone a feasibility assessment resulting in preliminary estimates of measure cost and energy impacts.
- Efficiency Maine Trust (EMT) must deem the project likely to be eligible for *implementation* funding under the Commercial & Industrial (C&I) Custom Program.
- TA funding application must be supported by a proposal from a qualified TA provider with a detailed scope and “not to exceed” cost.

# TA Incentive Eligibility Criteria



TA incentives are available for all three  
C&I Custom Program project types

# TA Incentive Funding Criteria

- Efficiency Maine may provide **50%** of the cost for an approved TA Study **up to \$20,000**.
  - \$20,000 TA Study – \$10,000 incentive
  - \$40,000 TA Study – \$20,000 incentive
  - \$50,000 TA Study – \$20,000 incentive
- Proposed TA Study cost should represent a small percentage of the anticipated total measure cost.

# TA Study Deliverables

- TA study report is intended to provide all documentation necessary to support an eventual C&I Custom Program project application (*implementation* funding).
- This documentation includes, but may not be limited to, the following:
  - Electronic copy of all data and analysis supporting the predicted energy impacts of the project
  - Clear documentation and support for all assumptions used in the derivation of predicted energy impacts
  - Documentation of energy costs used in analysis, including electric capacity costs (demand charges)
  - Manufacturers' performance specifications to support the predicted performance of primary components of the project

# TA Study Deliverables (cont'd)

- Preliminary design of the proposed measure
- Detailed line item breakdown of the anticipated project cost
- Copies of vendor quotes for project equipment/components
- Accurate model of the overall life cycle financial impacts of the project
- Documentation of the basis for non-energy costs or benefits related to the project that are reflected in the life cycle cost analysis
- A TA analysis review checklist specific to Distributed Generation projects is available on the EMT website at <http://www.energymaine.com/technical-assistance/>



# TA Process Step 1: Feasibility Assessment

- Applicant and/or TA provider (engineer) discuss potential measure with EMT rep and completes initial feasibility assessment. EMT rep can assist with energy impact assessment.
- EMT rep reviews feasibility assessment
  - Predicts the likelihood of eligibility for an implementation incentive
  - Determines if a more rigorous analysis is necessary to inform the final EMT incentive and applicant investment decision
- If it is deemed likely to be eligible for an implementation incentive, and is large/complex enough to require additional study, EMT representative advises applicant to apply for TA funding.

# Step 2: Initial TA Study Meeting

- The TA process is intended to be a collaborative effort involving the applicant, a 3<sup>rd</sup> party TA provider, and the EMT rep (ERS)
- For some measures (CHP installations), EMT may require the energy analysis portion of the TA study to be completed by EMT rep using specific tools and practices developed by EMT. There is no direct cost to the applicant for work completed by the EMT rep.
- Prior to submitting an application for TA funding, a meeting/conference call between all parties should occur to:
  - Clearly define the study scope
  - Clarify roles and responsibilities
  - Agree upon the intended deliverable and projected timeline

# Step 3: TA Application

- Applicant completes and submits a TA incentive application, supported by a study proposal from a qualified TA provider
- The TA study proposal must include the following elements:
  - Brief narrative description of the site and proposed measure including the feasibility study results
  - Description of the proposed analysis scope, approach, and time line
  - Description of the proposed deliverable from the TA study
  - Statement of TA provider’s corporate or individual qualifications demonstrating past experience with the proposed technology and the capabilities of the individual(s) who will conduct study
  - A “not to exceed” cost for the TA study including a clear description of how the study cost is derived

# Step 3: TA Application

- EMT rep reviews the TA application package
- EMT rep schedules a meeting/conference call to:
  - address any questions and/or request additional information
  - confirm a clear understanding of study goals, scope of work, responsibilities of all parties, and required deliverable
- EMT rep recommends approval or denial of the TA incentive to the EMT Program Manager
- EMT rep communicates the final decision to the applicant and TA provider

# Step 4: TA Study Execution

- Once the TA application is approved, the applicant authorizes the TA provider to proceed with the study
- EMT rep remains engaged with the process to address questions and provide input, guidance, and assistance
  - In some cases EMT rep may work in conjunction with the applicant and engineer to complete the energy analysis portion of the study
- TA provider compiles the study results and submits a final report to the applicant and the EMT rep
- EMT rep reviews report and communicates any deficiencies or required adjustments to the applicant and TA provider

# Step 5: Incentive Payment

- Once final version of the TA study report has been reviewed and accepted, applicant provides EMT rep with copies of invoice documenting the actual study cost
- EMT rep determines the magnitude of the EMT share of actual costs and prepares a final project review summary
- EMT rep submits review summary to EMT Program Manager, with a request that the payment be authorized
- EMT Program Manager issues an incentive check (representing EMT share of study cost) to the applicant

# TA Program Results (since 2014)

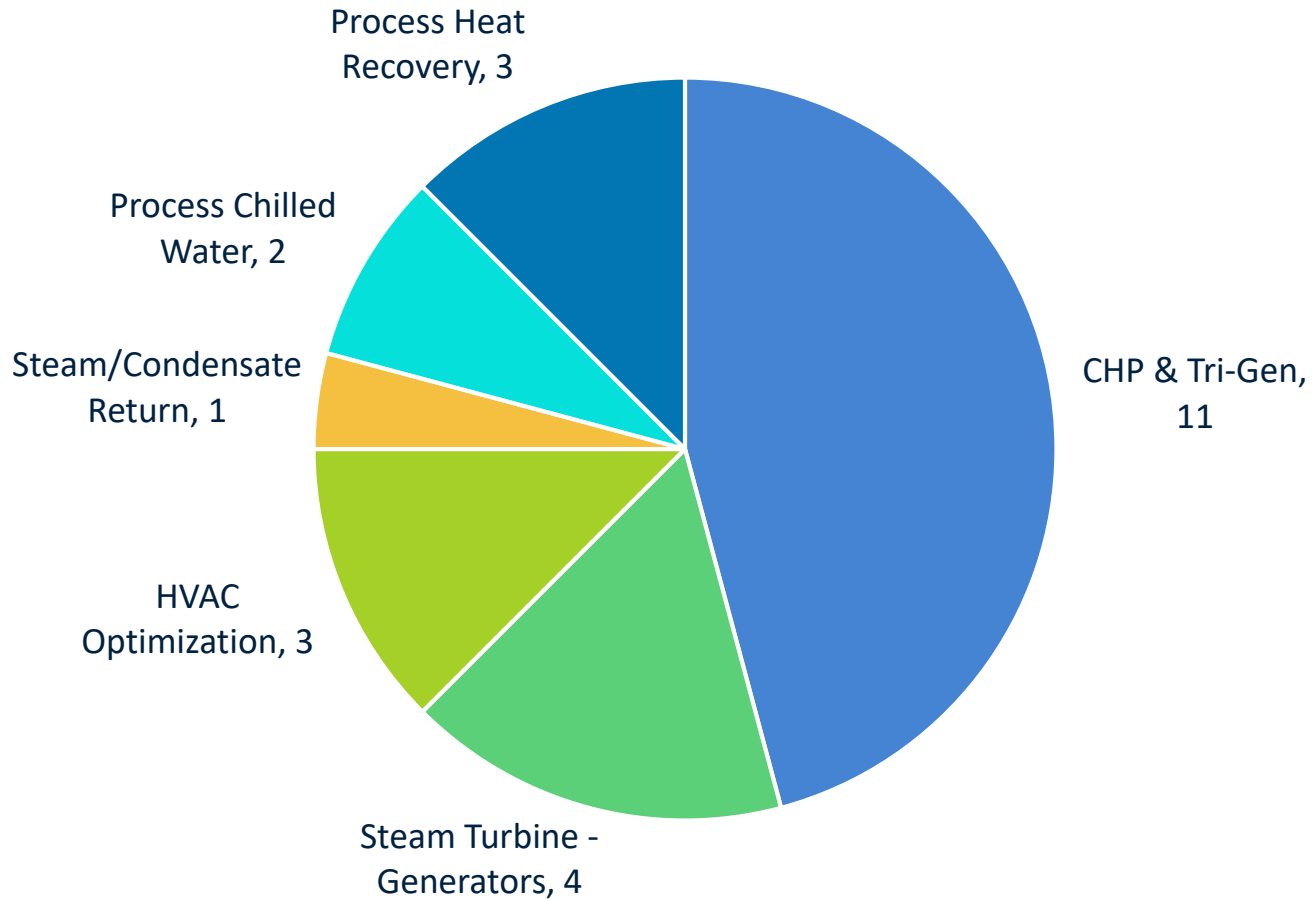
- Studies Authorized and Completed
  - 24 studies approved
  - 20 studies completed
  - 2 studies in progress
  - 2 studies canceled by Applicant
- Eligibility Results (20 Completed Studies)
  - 19 projects eligible for implementation funding
  - 1 project not eligible for implementation funding
- Implementation Results (20 Completed Studies)
  - 12 projects - completed
  - 3 projects - implementation in progress
  - 5 projects - Applicant delayed/declined implementation

# TA Program Results (since 2014)

- **Cost of Completed TA Studies (20 Studies)**
  - Total Combined Cost - \$388,260
  - Average Study Cost - \$19,413
  - Total Efficiency Maine Contribution - \$236,555
- **Cost of Implemented Projects (14 completed/in progress)**
  - Combined Project Cost - \$13,469,833
  - Combined EMT Implementation Incentive - \$6,204,526
  - TA Study Cost as % of Project Cost - 2.9%
  - EMT TA Incentive as % of Implementation Incentive - 3.8%
- **Energy Impacts (14 completed projects)**
  - 11,288,360 kWh per year Electric Savings
  - 20,388,177 lb. CO<sub>2</sub>e per year GHG Reduction From Fossil Fuel Savings



# TA Program Results (since 2014)



# Become A TA Provider

- Any individual or firm with demonstrated experience and capabilities in the applicable technology can provide Technical Assistance
- EMT maintains a list of known TA providers on the website
- If you wish to be added to the list, visit the website and follow the directions provided or contact Mike Watson directly

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