

Business Energy Pro A Pay for Performance (P4P) Pilot

Frequently Asked Questions

Revised 10/31/19

Proposal Package Guidance

- **Is it possible to bid more than one solution/design?**
 - Yes, you can propose multiple “sub-portfolios” as part of one bid package that represent different target audiences and measure mixes.
- **Is it possible to include any "clean energy" solution as part of a bid package?**
 - Yes, except for renewable technologies that cannot be part of a bid package. Heat pump technologies are allowed.
- **What type of incentives or % of payment are Customers expected to receive/be eligible for?**
 - It is up to you as a Portfolio Manager to determine what financing or incentives to offer your Customers. Con Edison reserves the right to review Customer Project Agreements to ensure Customer rights are protected.
- **Is there a minimum number of Projects that Portfolio Manager(s) need to secure?**
 - Refer to the table on Page 21 of the revised RFP for guidance relative to minimum required Project size based on projected Portfolio depth of savings.
- **Does a Portfolio Manager’s bid package workbook need to be comprehensive or can bidders use this document to show a core approach that will be augmented by other measures on a Project-specific basis?**
 - A core approach that will be augmented is acceptable. The P4P Pilot has been designed to support a comprehensive measure agnostic approach to delivering energy efficiency services to the small/medium business (SMB) market. Any change that impacts a Portfolio Manager’s Portfolio performance compared to their proposal may result in a contract modification.
- **Can Portfolio Manager(s) target and work with business / end-user groups other than what they have identified in their bid package workbook?**
 - A bidder’s response to the RFP will be scored based on their knowledge of the SMB market and experience working with identified end-use Customer groups. Portfolio Manager(s) are allowed to expand their offerings to other end-use customers not identified in their original proposal. All marketing to Customers must be coordinated with Con Edison to minimize Customer confusion. Any change that impacts a Portfolio Manager’s portfolio performance may result in a contract modification.
- **What is the blended average cost per unit (\$/kWh and \$/therm) for each category of Customer identified in the RFP and bid workbook?**

- Eligible electric Customers for this Pilot are categorized under service class 2 or 9 (small & medium businesses and multi-family common spaces with 2-4 residential units only) or service class 1 (religious institutions only). Eligible gas Customers are categorized under service class 2 rate 1. All Customers under the same service class are charged at the same rate, as referenced in the rates and tariffs publicly available here: <https://www.coned.com/en/rates-tariffs/rates>.
- **How does the category "All Others" on Page 8 of the RFP relate to the Customer segments on the "Additional Information" tab of the bid workbook?**
 - "Other" category on Page 7 of the revised RFP includes but is not limited to the following building types: Community, Education, Government, Hospitals, Large Office, and Transportation etc.
- **Will the list of the companies affiliated with the largest 500 Con Edison Accounts within the eligible service territories be available to Portfolio Manager(s)?**
 - Portfolio Manager(s) will not need to identify the Top 500 customers. Once contracted, Portfolio Manager(s) will receive the eligible Customer list (excluding selected Top 500 Customer Accounts outlined in the RFP).
- **What are the IT and CRM requirements for Portfolio Manager(s)?**
 - Portfolio Manager(s) should have the ability to accurately collect and maintain project data through a Customer Relationship Management (CRM) or other data-storage system. Their CRM system will be expected to support specific fields as outlined in the RFP to support data format compatibility and project data package upload to the AMV Platform.
- **How will Customer data be provided to Portfolio Manager(s)?**
 - Con Edison will set up a SFTP portal to support the transfer of eligible Customer information to Portfolio Manager(s).
- **Is there a specific eSignature service that NYSERDA and Con Edison require Portfolio Manager(s) to use?**
 - Portfolio Manager(s) can select a service of their choice, such as DocuSign.
- **What are the responsibilities for Portfolio Manager(s) around marketing efforts?**
 - Bidders should outline their marketing capability, resources available, and Customer acquisition plans in their RFP submission.
 - Con Edison and NYSERDA will provide co-branding guidelines. All marketing collaterals must be reviewed and approved prior to public release.
- **If a Portfolio Manager's Intervention incorporates real-time monitoring of upgraded end uses, do they still have to conduct site visits to support QA/QC requirements?**
 - Portfolio Manager(s) should plan to conduct site visits. QA/QC plans are expected to verify that measures have been installed in accordance with building codes, local permit and licensing requirements. QA/QC requirements should always specify on-site checks where subcontractors have performed the work. NYSERDA and Con Edison also reserve the right to perform inspections to ensure work has been completed in compliance with code and other pilot requirements.

Eligibility Guidance

- **Why is the limit 300 kW average annual demand? Can this limit be increased?**
 - The 300kW average peak demand limit is based on Con Edison’s Customer rate classes for small businesses. It will not be modified.
- **Is there a gas therm consumption cap for large multi-family (MF) customers identified in this RFP? And, following are there restrictions to what type of measures a Portfolio Manager can consider?**
 - Large MF customers are not eligible. The P4P Pilot does not place any gas consumption cap on any eligible customer and as a measure agnostic Pilot, it is up to the Portfolio Manager to determine what equipment is the most appropriate intervention package for their customer and building.
- **On Page 7 of the RFP, the graphic shows approximately 10% of eligible Customers are residential, with another 13% as multi-family common areas. Can you please provide clarity on this inclusion, as well as clarification on the number of eligible Customers per sector?**
 - The referenced RFP graphic on Page 7 has been updated to reflect modified Customer eligibility. Eligible Customers under this Pilot include multi-family common spaces with 2-4 residential units under service classes 2 and 9.
- **Are participants eligible to participate in and/or receive incentives from other Con Edison programs?**
 - No, eligible Customers cannot receive incentives from other energy efficiency programs, with the exception of demand response programs and other exceptions listed on Page 9 of the RFP.
 - Eligible P4P Customers are allowed to receive Con Edison’s Heat Pump incentive. It is up to you or your Customer to apply for this separately outside of the P4P Pilot.
- **Will a Customer become ineligible for this Pilot if they choose to implement only a single measure for their Project?**
 - Single measure adoption due to a Customer’s desire to install is not a disqualifier for a Project to be included in a Portfolio Manager’s Portfolio. However, if the implementation of single measure Projects becomes a pattern of behavior, then the Portfolio Manager will be engaged by Con Ed and NYSERDA and may be subject to contract modifications.
- **Are participants eligible to participate in and/or receive incentives from other NYSERDA programs in these geographic territories?**
 - Yes, eligible Customers can still participate in NYSERDA’s RTEEM and Clean Heating & Cooling programs. It is up to the Portfolio Manager or Customer to apply for this separately outside of the P4P Pilot.
- **Are Portfolio Manager(s) eligible to participate in other Con Edison and NYSERDA programs or does this restriction just apply to eligible P4P Pilot Customers?**

Portfolio Manager(s) as energy efficiency service provider(s) can access and support other program offerings as long as the target customers are not overlapping with the P4P pilot.”

Non-Routine Event (NRE) Considerations

- **Who is responsible for collecting information on any NRE?**
 - The AMV Platform will screen all projects on an annual basis to detect energy consumption patterns suggestive of possible NRE activity.
 - Portfolio Manager(s) should also monitor their Projects’ performance and report any identified NREs.
- **Will information on NRE detection and confirmation be available to the Portfolio Manager?**
 - Yes, the AMV Platform provides Portfolio Manager(s) with the ability to review individual Projects within their Portfolio and see those that have been flagged for review based on reported or detected NRE activity.
- **Are NREs identified by unexpected changes in total energy consumption, or gas or electric-only consumption events? Will the implementation of an overall beneficial fuel-switching measure trigger an NRE?**
 - Changes in either electric or natural gas consumption could trigger an NRE independently. If a fuel switch were to trigger an NRE, the Project would be reviewed, and after confirming that the NRE was the result of a beneficial fuel switch, a non-routine adjustment (NRA) would not be applied to the Project.
- **Who is responsible for processing and documenting non-routine adjustments (NRA)?**
 - The Pilot Evaluation Contractor is responsible for processing NRAs. NRA approvals will be tracked and documented in the AMV Platform and can be viewed by Portfolio Manager(s) at any time. All Project payment adjustments will be calculated by the AMV Platform and are considered binding for contracted Portfolio Manager(s).
- **Will NRA payments only include the gas savings, or will electric savings be converted into the agreed upon MMBtu rate?**
 - An NRA can be applied to electric and/or gas savings. In addition, each Portfolio Manager(s) contracted payment / energy unit (\$/therm and \$/kWh) are considered equal or equivalent values.

Natural Gas Savings

- **How is the Gas Kicker payment calculated?**
 - The AMV Platform will calculate gas savings across projects located in the Westchester area during January and February and submit these for the x2 Gas Kicker payment.
 - Gas Kicker payments are calculated as part of each project’s Annual Adjustment Payment.
- **Will the Gas Kicker payment be calculated in Year 1 of the performance period?**
 - Yes, Gas Kicker payments are calculated as part of each project’s Annual Adjustment Payment starting in Year 1 and ending in Year 3.
- **What interval of gas consumption will be used in the AMV assessment?**

- Hourly interval in 100 ccf will be provided for all Customers with gas AMI data. Monthly data will be provided for all other Customers.
- **Should Portfolio Manager’s consider Gas Kicker payments as part of their implementation strategy?**
 - Gas Kicker payments are set as a motivating factor for Portfolio Manager(s). Portfolio Manager(s) are encouraged to develop cost-effective and comprehensive packages that will effectively target gas savings in the Westchester area.
 - Portfolio Manager(s) should not include any calculation of the x2 Gas Kicker payment in their bid request. This will be calculated during contracting and considered additive.

Pilot Awareness and Marketing Support

- **Con Edison’s Campaign Support**
 - Con Edison to host websites with Pilot program details and Green Button Connect enrollment instructions.
 - Launch Customer awareness email campaign targeted for eligible Customers.
 - Con Edison to provide information/ support to help Portfolio Manager(s) develop marketing collaterals, and to handle Customer inquiries.
- **Joint Pilot Marketing Efforts**
 - Portfolio Manager(s) will use cobranding guidelines provided for all collaterals and communications to Customers; which should be submitted to Con Edison/ NYSERDA for approval at least 30 days prior to public release.
 - NYSERDA will also launch a small business education campaign (Put Energy to Work) to create awareness of energy efficiency, Portfolio Manager(s) should coordinate on timing for all marketing campaign with ConEdison / NYSERDA.
- **Customer Acquisition**
 - Portfolio Manager(s) have full responsibility for all Customer acquisition activities.
 - Con Edison will provide targeting metrics in the customer eligibility list.

Payment Process and Calculations

- **Is it possible for a Portfolio Manager to have a negative value for their Annual Adjusted Payment? If so, what happens?**
 - Yes, it is possible for a Portfolio Manager to receive a negative Annual Adjusted Payment if your actual metered savings fall below 50% of predicted savings.
 - If this happens, then the negative value will reduce the applicable Portfolio cohort payment.
 - In the unfortunate and unlikely scenario that an entire Portfolio cohort payment is a negative value, then it will be assessed against the payment for next quarter.
- **Can Portfolio performance impact contract terms?**
 - Contract modification including payment and contract amount may be made if:
 - Less than 25% of expected Customers are enrolled by end of year 1.
 - Greater electric or gas savings are achieved than the contracted value
 - Weighted average EUL for the Portfolio changes more than 10% from bid submission

- **Will there be a limit to the amount of contract increase involved with certain additional scenarios, as referenced in the Contract Management and Performance terms?**
 - There will be no cap for over-performance of Portfolios, provided that Portfolio Manager(s) are submitting Projects that are reasonably in keeping with their proposals.
 - However, funding for this Pilot will be bounded by the funding currently allocated in NYSERDA's P4P Investment Plan.