



Community Energy Efficiency Program
Scaling Decarbonization in Hard to Reach Residential Markets
Request for Letters of Intent and Concept Papers

Letters of Interest Due: July 29, 2022

Implementation and Development Grants for Scaling Decarbonization in Hard to Reach Residential Markets Are Available

The Washington State University (WSU) Energy Program will award up to two implementation grants of between \$1.0 – 1.5 million. Applicants for implementation grants must have capacity to begin delivering services before the end of calendar year 2022.

Up to five development grants of up to \$75,000 will also be awarded for proposals that are not ready for deployment in the next year. Applicants may apply for both implementation and development grants – but all unsuccessful implementation proposals will automatically be considered for development grants.

Purpose and Overview

The WSU Energy Program delivers program management, on-site assessments, analytical tools, and training to meet evolving energy challenges in the State of Washington, the Pacific Northwest, the United States and internationally. Partnering with a wide range of agencies, organizations, institutions and businesses, our energy experts identify energy challenges, and develop and implement solutions.

One program that the WSU Energy Program administers is the Community Energy Efficiency Program (CEEP). The Washington State Legislature initiated CEEP in 2009. The WSU Energy Program was directed to develop and implement pilot programs providing community based residential, and small commercial energy efficiency upgrades. Since its inception the Legislature has reaffirmed CEEP's focus on serving households, communities and markets that are hard to reach and serve within the limits of existing utility programs and federal funding (for example Low Income Weatherization). Hard to reach segments include but are not limited to:

- Near low and moderate income households
- Non-utility fuels (oil, propane, wood)
- Market Rate Rentals
- Rural or other areas with limited program delivery infrastructure



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More recent guidance from the Legislature and [the 2021 Washington State Energy Strategy](#) directs CEEP to increase focus on:

- Testing and deploying strategies to recruit participants and install measures to maximize carbon reduction
 - Focus on home electrification through the replacement of space and water heating equipment that is fueled by a fossil fuel with an efficient electric space or water heating system
- Projects led by community-based or non-profit organizations
- Providing services in areas of the state that have not previously had CEEP services and funding available (See General Guidance)
- Population and communities in harder to reach and serve households, communities, and buildings
 - Expand program service delivery to homeowners with incomes too high to qualify or be prioritized for low-income programs but too low to afford major energy efficiency home improvements without assistance
 - Develop service delivery models that can complement utility program and service models and address situations utilities are challenged by including electrification, fuel switching, dual fuels and high barrier households
 - Providing services and/or measures that are challenging to provide through existing federal, state or utility funding
- Testing and deploying innovative outreach, readiness and delivery models with potential to deliver at scale or across larger service areas

Implementation Grants: The WSU Energy Program anticipates inviting no more than three submitted concept papers to apply for an Implementation Grant. Up to two separate implementation awards, of potentially different amounts, not to exceed the available total program budget of approximately \$2.5 million dollars will be awarded. Implementation grant total application budget must be for a minimum of \$1.0 million dollars (not including match). Implementation grant recipients are expected to be delivering projects and installations at scale and be completed by June 2023. An additional six month extension may be possible but cannot be guaranteed.

Successful implementation grant invitees must meet minimum requirements:

- Applicants must be available for work, and licensed to do business in the State of Washington
- Have a minimum of two (2) years of experience implementing residential energy efficiency or building energy services including
 - Customer and client acquisition
 - Program and service delivery and oversight



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- Experience requirements can be met through a partnership with organizations with which the applicant establishes a contractual relationship. Partnerships with established contractual and business relationships will be scored higher

Successful implementation grant concept proposals must provide convincing evidence of a feasible strategy, resources and established infrastructure and a schedule to deliver services with CEEP funding within 60 days of the grant contract being signed and also to meet proposed targets by the grant close.

Implementation grant Invitees may enter a second final award round requiring submission of a detailed Implementation proposal for WSU Energy Program review and approval prior to final award. The detailed implementation proposal will address the following tasks:

- Complete a work plan including targets, measure specifications, outreach and recruiting strategies and basic processes and methods and submit to the WSU Energy Program for review
- Provide a budget and staffing plan for executing the work plan
- Conduct outreach and recruit candidates in hard to reach segments
- Provide readiness or other support services to reduce barriers to Decarbonization Energy Efficiency Services
- Verify and document that participants are in hard to reach segments
- Provide assessments as needed to assure measures are specified correctly and installations are appropriate and completed in accordance with local codes and requirements
- Work with customers as needed to secure utility funding or other financial support (where appropriate)
- Select and provide oversight of staff or Sub-contractor(s) to perform energy efficiency services.
- Assure staff and Sub-contractors are compliant with state and local requirements such as prevailing wage (if applicable)
- Document/report measure installations and service to target populations (monthly) and complete other required reports (See Attachment A: Guideline Definitions)
- Establish and maintain a quality assurance plan which will be developed on a case by case basis with the WSU Energy Program

The WSU Energy Program will review proposals and make a final award recommendation on the basis of a competitive review. An invitation to submit an Implementation Proposal does not imply an explicit commitment for funding an Implementation Proposal.

Implementation concept papers which are not invited to submit for an implementation grant may be offered a one-time – one year concept/program development grant of up to \$75,000.



Development Grants: Development grants of up to \$75,000 are intended to support initial project development and startup and may be used for:

- Developing work plans and proposals for upcoming CEEP funding cycles
- Preparing measure installation, business process or other elements necessary for a successful project
- Establishing contractual relationships, utility and other matching funds partnerships or vendor networks
- Research, development and marketing
- Any other tasks or activities necessary establishing or scaling up Decarbonization initiatives

Development grant applicants must specify how they will use development grant funding to address startup costs and barriers and what deliverables or tasks will be completed with development grant funding.

Development Grant Recipients successfully completing development deliverables will be short listed for future CEEP funding, if it becomes available.

All implementation and development grant applicants – regardless of grant award status – may request an application debriefing. The debriefing will focus on how the Decarbonization concept/proposal could be strengthened to be more competitive in future CEEP rounds.

General Guidance on CEEP Priorities and Principles

The following guidance outlines the general criteria used to evaluate implementation and development concept proposals. It is understood that there are trade-offs among criteria and that all proposals may not be able to meet all criteria.

Innovation in Residential Building Decarbonization: A core focus on CEEP investments is to encourage and test new approaches and strategies that do not duplicate (but may complement) existing programs, services and delivery models. Innovation can take many forms including:

- Testing new
 - Decarbonization measures and services
 - Measure funding – financing strategies
 - Partnerships or delivery models
- Deploying and/or scaling models and services that
 - Have been developed in other states and countries but not deployed or deployed at scale in Washington
 - May be available in one area of the state but are generally not available in the proposed service territory



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Innovation is not an absolute requirement, however *proposals* that duplicate existing local services and models are less likely to be successful.

Reaching Hard to Reach Markets and Customers: CEEP funds are intended to reach markets and customers that are less likely to be served with existing programs and services. Proposals are expected to clearly identify which hard to reach markets will be targeted, what strategies, approaches or incentives will be used to reach them, and how will hard to reach status of participants be determined or verified. Initiatives which address multiple barriers, for example near low and moderate income households with non-utility fuels or in market rate rentals will be scored higher.

Scalable: A core goal for the CEEP program is developing and testing delivery models that have the potential to provide energy efficiency and Decarbonization services to large numbers of households and which can be replicated and delivered across Washington State. Proposals providing or with the potential of providing services to hundreds or thousands of households per year would score higher on this criteria than a project or proposal serving 50 to 100 households. Pilot efforts serving small populations would be considered for funding if there is a likely path for broader adoption.

Characteristics associated with desirable and scalable projects include:

- *Simplicity:* Complex measure installations or program delivery designs are difficult to scale because they require multiple participant decisions, are disruptive, and require extensive and hard to sustain support structures and staffing. Cost, supply chain and household time and effort factors support the idea that Decarbonization is a multi-step process and not a singular event. Two examples of complex designs that were difficult to scale in prior CEEP rounds were comprehensive whole house upgrades, and efforts to bundle bids in a single neighborhood. Whole house and multi-measure installations are not precluded as they are a good fit for some situations, but proposals built around these approaches would need to make compelling arguments on how they could be delivered at scale.
- *Phasing:* Successful proposals will have a clear and well thought out strategy for scaling up installation and service volumes, expanding service delivery areas or client segments served.
- *Limited financial investment requirements for program participants:* Project designs that rely on primarily participant financing or large capital outlays generally do not reach near low and moderate income clients. Nevertheless, some participant financial participation is associated with better long term outcomes and overcoming “welfare resistance”. Further, the WSU Energy Program experience and research indicate that information/outreach/referral models have been shown to have very low uptake rates, and therefore not the type of impacts that are being sought.



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- Transparent and replicable program services and models: Proposals extensively relying on proprietary service delivery models will also be less competitive as the expectation is that Grant Recipients will produce measure specifications, workflows and other program documentation to allow other entities to replicate and deliver services in other areas of the state.

Leverage: CEEP investments are intended to leverage or complement existing programs where possible. Priority will be given to projects which offer a 1:1 leverage ratio. Leveraged resources must include operational funding. Leveraged investments from participating customers may be included but proposals requiring large participant capital investments are not likely to score high as they are not likely to reach income-qualified participants (see above).

Reasonably Cost-Efficient: Given the focus on hard to reach markets, innovation and Decarbonization, the expectation is that projects and measures would not be subject to existing utility cost effectiveness standards. In evaluating proposals, CEEP uses a less restrictive “reasonable” cost standard. In applying these standards, the primary focus is on energy and carbon benefits. We encourage applicants to document non-energy benefits such as health, comfort, workforce and economic development. Projects providing greater non-energy benefits will receive a higher score if they also meet the reasonable cost standard.

Community – Based: The Washington State Legislature has requested that preference be given to community-based entities that can be responsive to local needs and concerns. These include:

- Non-Profit Entities/Organizations
- Local Community Service Agencies

Other entities may apply but will be given lower priority:

- Washington State public sector entities including:
 - Units of general purpose local government
 - Colleges and universities
 - Publicly owned electric or natural gas utilities
 - Public service companies
- For profit businesses

All concept proposals should include a discussion and strategy for how services will be coordinated and responsive to local community needs.

Sustainable: The following characteristics have been associated with viable, effective and sustained CEEP efforts by Grant Recipients:

- A mission driven focus on building energy services and working with hard to reach segments



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- Experience with delivery of building efficiency services
- Credibility and an established presence in the community
- Working relationships with utility programs and funding
- Other sources of revenue and funding. CEEP is funded via the capital budget on a two year cycle. Funding is episodic and cannot be relied on exclusively to sustain operations.

Expansion to Unserved Areas of the State: The Legislature has also directed the program to prioritize areas of the state which have not had access to CEEP programs and services. Priority areas for implementation grants are described in Attachment B.

Application Submission Guidelines

The following guidelines are intended to outline general expectations for content and general format

All potential applicants are ENCOURAGED to provide the WSU Energy Program with a Letter of Interest. Applicants submitting a Letter of Interest will receive updates, be able to submit questions and will receive a secure link for electronic file submission and a confirmation that applications have been received.

Letter of Interest:

- Who is the applicant?
 - Organization Name and Location
 - Primary Contacts (Name and Contact Information).
- Who are Partners (if applicable)
 - Organization Name and Location
 - Primary Role
- What type of grant the applicant is seeking? (Implementation or Development)
- Brief concept highlights including Decarbonization measures and services being offered, hard to reach markets being addressed and proposed service area.

A Letter of Interest is not required to submit a concept paper.

Implementation Concept Proposal:

Summary Page (Same content as the Letter of Interest)

Narrative (up to 10 pages)

- Who is on the team?
 - Partners and roles?
 - Are working relationships in place?



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- Provide evidence that the applicant and/or Grant Recipients meet the minimum experience standard (two years of experience with residential efficiency or Decarbonization upgrades)
- What Decarbonization Measures are being offered or installed?
 - How is this different from measures and services currently being offered in the service area?
 - What is the typical measure installation package?
 - If deploying standard efficiency measures, we will use existing regionally accepted utility estimates as established by the Regional Technical Forum
 - If alternative or new measures are being proposed, estimate reductions and provide methodology for estimates in supporting documentation?
- Which hard to reach segments will be served?
 - How will hard to reach status be established and verified?
 - What are the mechanisms and/or strategies for reaching the hard to reach segment and getting uptake of Decarbonization measures?
 - How do proposed mechanisms/strategies differ from existing services, incentives and programs currently offered in the service area?
- What is the high level work plan?
 - What are key tasks, milestones and dependencies?
 - Who is responsible for major tasks and outcomes?
 - What are proposed targets for recruitment, completion of Decarbonization projects?
 - What is the strategy for phasing or scaling up if future funding becomes available?
- What is the proposed implementation budget?
 - What will CEEP pay for?
 - What services and activities will be leveraged?
 - Are leveraged funds or services committed?
 - If so, provide supporting documentation.
 - If leveraged resources are not yet secured, provide a timeline for securing them.
 - Specify the budget for the entire implementation grant period.
 - Implementation grant applicants may propose continuation/scaling budgets for subsequent CEEP cycles.

A table similar to the one below is recommended to summarize budget and leverage strategy for program implementation.



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Cost Area	CEEP Funds	Leveraged Funds/In-kind services	Leverage Source(s)
Outreach and Recruitment	\$50,000	\$150,000	XYZ Group
Program service delivery (assessments, contractor management, quality assurance)			
Administration (HR, Information Systems, Management, reporting)			
Measure Cost – Incentives			
Other Cost Area (List)			

Supporting Documentation

Applicants have the option of providing up to 25 pages of supporting documentation. Supporting documentation could include documentation for meeting minimum qualifications, letters of commitment for partners and leveraged funding and estimates and methodology for carbon and energy savings – if new measures are being proposed. Optional supporting documents include relevant research or background from similar initiatives, documentation of experience, estimates of savings or expansions on budgets or work plans. Supporting documentation should be annotated to indicate what sections of the concept paper are supplemented by the supporting documentation.

Development Grant Proposal:

Summary Page (Same content as the Letter of Interest)

Narrative (up to 10 pages)

- Decarbonization Proposal
 - What Decarbonization Measures are being offered or installed?
 - How is this different from measures and services currently offered in the service area?
 - What are the expected energy savings and/or carbon reduction per installation?
 - Which hard to reach segments will be served?
 - What are the mechanisms and/or strategies for reaching the hard to reach segment and getting uptake of Decarbonization measures?
- Who is on the team?
 - Partners and roles? Are working relationships in place?
 - Experience with residential efficiency or Decarbonization upgrades.



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- What is the development plan and strategy?
 - Describe current barriers and needs for development investment
 - What development deliverables will be provided?
 - What are key development tasks and milestones?
 - What resources or funding will be leveraged to contribute to development activity?
- Optional – Preliminary Deployment Budget and Work Plan
 - Note Detailed Work plans and budgets may be a proposed deliverable
 - What are proposed start up dates and installation targets assuming implementation funding was available?
 - What are minimum and maximum CEEP investments you would need for implementation starting July 2023?
 - What is the proposed funding model?
 - What services and measures will CEEP pay for?
 - What services and activities will be leveraged? Who will provide the leveraged services or funding?

Supporting Documentation

Applicants have the option of providing up to 25 pages of supporting documentation. Supporting documentation may include letters of commitment, relevant research or background from similar initiatives, documentation of experience, estimates of savings or expansions on budgets or work plans. Supporting documentation should be annotated to indicate what sections of the concept paper are supplemented by the supporting data.

How to Submit a Proposal

The WSU Energy Program Concept Proposal Manager is the sole point of contact at WSU once the concept proposal solicitation is released. All communication between the Applicant and WSU upon receipt of this solicitation shall be with the Proposal Manager or their designee. Any other communication will be considered unofficial and non-binding by WSU. The proposal manager for this solicitation is:

Tanya Beavers, WSU Energy Program

PO Box 43165
905 Plum St SE
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ceep_proposals@energy.wsu.edu

Phone 360-956-2133



All Correspondence concerning this solicitation after RCP release should be through the proposal manager – or special accounted-mail

Letters of Interest may be submitted by

- [E-mail](mailto:ceep_proposals@energy.wsu.edu) at ceep_proposals@energy.wsu.edu
- Fax at 360-956-2217

All entities submitting letters of interest will be given access to a secure file sharing site. Concept Papers can be submitted in electronic format (PDF or Word) via e-mail or in hard copy at the address above

Request for Concept Proposals Released	June 29, 2022
Proposers Conference	July 20
Questions and Answers FAQ	July 22
Letters of Interest Due	July 29
Concept Papers Due	August 19
Review and Selection	August
Debriefing and notification (TBD)	September

Screening and Section Process

The WSU Energy Program will convene a selection committee that includes WSU Energy Program staff and at least one Washington Department of Commerce representative. The WSU Energy Program may at its option invite other persons with subject-matter expertise to participate in proposal review.

Implementation Proposal Review Process: Implementation Concept Proposals will be screened in two phases:

Phase 1: Minimum Requirements - Implementation Feasibility

Does the proposal meet minimum experience requirements and provide convincing evidence that they will be able to deliver services and meet targets over the implementation period?

Proposals that are screened out at this stage will be automatically considered for development grants.

Phase 2: Grant Award

If screened in proposals total more than available implementation funding, the proposals will be scored and ranked using the criteria summarized in the general guidance above, specifically:

- Innovation
- Strategy and targets for reaching hard to reach markets



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- Scalability
- Community Based Delivery Partners
- Sustainability
- Priority CEEP Service Areas
- Cost effectiveness
- Leverage

No more than four ranked proposals will be invited to submit detailed implementation proposals. Detailed implementation proposals will be required from all implementation grantees.

Applicants which do meet minimum scores, but are not selected for implementation grants may be given the opportunity to participate as a Development Grant Recipient.

Development Proposal Review Process: Up to five Development or Implementation Applicants will be awarded development grants using the general guidance and criteria below. As these are development grants, selection criteria are more heavily weighted to innovation and scalability.

- Innovation
- Strategy and targets for reach hard to reach markets
- Scalability
- Community Based Delivery Partners
- Sustainability (5)
- Priority CEEP Service Areas
- Cost effectiveness
- Leverage



Attachment A: Guideline Definitions

Applicant: Organization submitting a Proposal in order to attain a contract with WSU.

Assessments: For the purposes of this procurement – an assessment is defined as an assessment of the suitability and requirements for installing a specific measure or measures being offered to assure it is specified appropriately and installed in accordance with local codes and requirements. A comprehensive assessment of Decarbonization and/or energy efficiency opportunities is not required for all installations. If broader assessments of Decarbonization are included in the proposed model they should be specified as comprehensive Decarbonization assessments.

Building Decarbonization Measures: Any measure that is expected to reduce a building's energy consumption and/or carbon footprint. This may include home electrification, energy efficiency upgrades, or renewables. Decarbonization measures may include behavioral measures or building/equipment maintenance and optimization services that can be linked to reducing carbon. To be counted as a building Decarbonization measure, a measure must be installed or an action taken for which carbon reductions can be estimated or attributed to.

Community-Based Entity: A community-based entity is responsive and coordinated with local neighborhood, city or county needs. The highest preference is given to non-profits and local community service agencies with local governance. Second priority is given to statewide or regionally based non-profits. Third priority are public sector entities including utilities and for profit businesses. Entities without local governance are expected to include a plan or strategy coordinating or sharing information with local entities in the proposed service area(s).

Coordinated Services: Service coordination means sharing information on programs and services being offered and to be willing to make and accept referrals for complimentary services and programs. It can include – but does not require – formal agreements or an articulated process for integrating measures or service delivery.

Customer: Residents and building owners receiving incentives or services.

Customer Contribution: Amount of measure or service costs paid or financed by participating customers. We do not have specific requirements and limits on customer contributions. As a general guideline for income qualified households – we would expect required customer contributions over \$1000 are likely to severely limit take up and participation. Building owners may have higher thresholds.

Decarbonization Readiness Services: A measure, service or investment which will reduce a barrier, prepare for eventual conversion, or otherwise significantly increase the likelihood of Decarbonization. This may include pre-planning, site assessments, infrastructure investments – such as electrical system upgrades, or advance purchasing.



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Duplicative services: The intent of this solicitation is to complement and extend current Decarbonization measures, services and programs. A service or measure is considered duplicative if the measures, services and targeted population is currently served by another entity or program. For example, providing comprehensive weatherization services to households below 200% of FPL clearly duplicates federal low income weatherization services. Providing assessments or outreach concerning existing utility incentive programs mostly duplicates utility programs and outreach. Targeted outreach and utility incentive enhancements are more likely to be complementary. In evaluating this criteria we look at whether measures and services proposed are readily available and accessible via existing programs and delivery infrastructure in the proposed service area.

Grant Recipient: Organization with a Proposal accepted by the WSU Energy Program and awarded a fully executed, written contract.

Home Electrification: The replacement of space and water heating equipment that is fueled by a fossil fuel with an efficient electric space or water heating system. Fossil fuels include natural gas, propane, or fuel oil. Wood heat replacement may be included only if all wood burning devices are removed and decommissioned. Limited use propane/natural gas as a backup fuel may be permissible, as long as a backup heating system cannot be readily switched to the primary space or water heating system.

Leveraged costs: Leverage ratios will be estimated based on the total program costs (measure costs, delivery costs, and administration). Leveraged resources may be direct (for example utility incentives and rebates, customer contributions), or indirect (in the form of administrative or delivery support services).

Multi-family units: A structure with three or more contiguous units on two or more floors. Duplexes are not considered multi-family

Market Rate Rentals: Rental properties that are not qualified or receiving state or federal subsidies or tax incentives for serving income qualified households – such as the Housing Trust Fund of HUD.

Near Low and Moderate Income Households: For the purpose of this effort, households with incomes up to 250% of the Federal Poverty Level (FPL) or 80% of average median income qualify as near low to moderate income households. Service areas with high housing costs may include populations up to 300% of FPL. Grant Recipients may provide services to households eligible for federal low income weatherization funds (125% FPL) as long as these efforts are coordinated and not duplicative.

Income Qualification: A system or method establishing customers are likely to meet income criteria. This could include referrals, categorical eligibility (household recipient of other income qualified service), or self-attestation with random verification. Stringency of income verification should be related to measure or service investment. Grant recipients will not be expected to maintain detailed client income data. Part of the innovation strategy could be developing



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systems or methods to assure that incentives or services are likely to reach income qualified households that are not intrusive, duplicative or likely to significantly discourage participation. However, projects without mechanisms for income qualification or targeting will not get credit for serving this key market segment.

Partner: An entity providing critical capacity with which the Grant Recipient has a service delivery relationship.

Reasonably Cost Effective: Models which deliver energy and carbon reduction benefits at up to three times normal utility cost standards for delivering residential energy efficiency resources would likely meet this standard. Projects more than five times typical utility costs would not be likely to meet this standard. Typical utility costs can be found in conservation plans and Integrated Resource Plans. For example, first years savings for 2021 electric conservation plans for Investor Own Utilities as reported by Washington Utilities and Transportation Commission is about \$440/Mwh.

Reporting Requirements: In addition to standard fiscal reporting and **invoicing** the WSU Energy Program CEEP program requires monthly address specific reporting for all measures and incentives over \$500. In addition to the addresses, reporting should include dates of service for CEEP investments, leveraged investments, measures installed and whether customer/address is a member of a hard to reach class. Summary data (measure counts by zip code or other geography) will be sufficient for low cost measures. Specific reporting requirements will be negotiated by grant. Grantees are also expected to provide quarterly narrative progress reports and may be asked to participate in phone/Zoom check ins.

Rural or Limited Infrastructure: An area of the state which does not have access to the contracting or service delivery infrastructure. At least two contractors/providers within 30 minutes drive time. While rural areas of the state may be more likely to have limited infrastructure – rural status alone is not sufficient to document infrastructure limits. Similarly some urban areas may not have ready access to specialized services or contractors with experience working with specific measures or willingness to participate in existing utility or other incentive programs.

Sub-contractor: Successful Grant Recipients become a Grant Recipient of the WSU Energy Program. Any individual or company with which the Grant Recipient enters into an agreement for work under the grant agreement becomes a Sub-contractor.



Attachment B: Priority Service Areas

Priority Counties for 2022 CEEP Expansion Grant

