

Changes to the Enhanced Track of Energy Design Assistance: Overview and Process

I. OVERVIEW

Xcel Energy modified the Energy Design Assistance (EDA) program to provide reimbursement for early analyses conducted under the EDA “**Enhanced track**” of the Business New Construction offering to a customer’s chosen consulting company, beginning January 1, 2011. The EDA program offers an Enhanced and Basic track. The Basic track, which includes whole building modeling, will not be modified. Xcel Energy believes that opening the early analysis part of the enhanced track to additional consultants will encourage more early analysis in new and renovated buildings and increase energy savings. This modified Enhanced process has come about through discussions with various companies who have showed support for this process.

The Enhanced track is for Public Service customers in Colorado who are planning on obtaining a sustainable green building certification that is 3rd party verified, such as the U.S. Green Building Council’s Leadership in Energy and Environmental Design (LEED-NC). The Enhanced track provides additional analyses opportunities (from the Basic track) to help customers reach higher energy savings. The Enhanced track requires projects meet or exceed 30% energy demand savings above Xcel Energy’s baseline—ASHRAE 90-1-2004 energy standard.

The Enhanced track includes the following types of analyses, all of which are required to start in the early design stage of a new construction or major renovation project that has been accepted into the EDA program, enhanced track. All or some of the analyses types may be chosen for the approved EDA project. Enhanced analyses include:

- **MASSING/ORIENTATION ANALYSIS** – Create and compare alternative building massing and orientation to maximize energy efficiency
- **DAYLIGHTING ANALYSIS** – Create and compare alternative window sizes and placement for daylighting harvesting, sun shading options, and controls.
- **EARLY HVAC ANALYSIS** – Create and compare alternative HVAC system types and zoning options to maximize energy efficiency. (Energy optimization in the Basic track will cover analysis on efficiencies of selected system)
- **LIGHTING ANALYSIS** – Create and compare alternative lighting techniques prior to full analysis. (Energy optimization in the Basic Track will cover analysis on efficiencies of selected system)
- **GREEN BUILDING CERTIFICATION SUBMITTAL** – Create and submit necessary information for the Energy & Atmosphere Credit 1 (EAc1) portion of the LEED process, or other 3rd party verified sustainable green building certifications.

The Enhanced process of Energy Design Assistance has been adjusted to allow our customers to complete energy analysis in early design, using either Xcel Energy’s contracted EDA consultants *or* the customers chosen consultant (called the “Open Enhanced Consultant”). Prior to starting any early analysis, acceptance by Xcel Energy into the EDA Enhanced program track is required. Analysis partially or fully started prior to the introduction meeting of the Enhanced project will not be accepted for reimbursement.

Enhanced incentive reimbursement structure

Xcel Energy will provide an incentive for early analyses to an Xcel Energy customer or designated recipient as follows:

Massing/Orientation Analysis	Up to \$4000
Daylighting Analysis	Up to \$4000
Early HVAC Analysis	Up to \$4000
Early Lighting Analysis	Up to \$4000
LEED Submittal	Up to \$4000

Total Enhanced incentive reimbursement cap is \$20,000.

These incentive reimbursement amounts and total cap are based on Xcel Energy’s current reimbursement protocol and cost-effective requirements. This funding from Xcel Energy offsets the enhanced analysis services costs, and is not intended to pay in full for Enhanced modeling services.

The incentive will be paid to the customer (or designee such as the architect) upon completion of the following documents:

- Final report, sent to Xcel Energy Program Manager.
- Invoice and Incentive Request Application, signed by the customer. (See deliverables section below for details.)

II. OPEN ENHANCED PROCESS

The following is a description of how this modified Enhanced process will work.

Application stage: The Energy Design Assistance program application will have questions such as:

1. Are you planning on obtaining a sustainable building certification (third party verification)? Yes__ No___. If yes, which certification? _____
2. If yes above, are you interested in conducting additional early energy savings analyses to reach a higher energy goal (listed below)?
 - MASSING/ORIENTATION ANALYSIS
 - DAYLIGHTING ANALYSIS
 - EARLY HVAC ANALYSIS

- LIGHTING ANALYSIS
- GREEN BUILDING CERTIFICATION SUBMITTAL

3. Do you have a consultant who can provide these services or would you like an Xcel Energy EDA Consultant to provide this for you? *

- I have a consultant ____ If yes, please provide name and contact information_____
- I would like to use an Xcel Energy EDA consultant_____

****Note: In all cases, Xcel Energy’s EDA consultant will provide the EDA Basic Track services for all projects. This includes energy optimization (integrated whole building modeling), final verification of installed measures, and incentive calculation.***

Application timing: For early analysis to occur, an application should be received as early as possible in the design process, but it must be received by Xcel Energy no later than the early stages of schematic design. Applications received during design development or later will not be eligible for the Enhanced Track.

Xcel Energy’s review of submitted application:

If the customer **does not** have a designated consultant noted:

- Follow current program guidelines in which Xcel Energy’s EDA Consultant can offer Enhanced services through the EDA program.

If the customer **does** have a designated consultant (other than the EDA Consultant) noted on their EDA application **and** the project is potentially eligible for the Enhanced Track services:

- Xcel Energy sends a preapproval email to inform the customer that they can participate in the EDA program and use their chosen Open Enhanced Consultant for the Enhanced Track analyses. Xcel Energy also states who the EDA Consultant will be for the Basic Track services, which includes whole building energy optimization integrated modeling. **The customer and/or project manager (often the architect) is responsible for any agreement or contractual obligations with the Open Enhanced Consultant for any work conducted in this process.**

Enhanced meetings and deliverables stage: The EDA Enhanced process begins early in the pre-design building stage, and includes at least one meeting:

- **Kickoff Meeting** - This introductory meeting is primarily designed to establish goals and project scope. The EDA Consultant is responsible for initiating this meeting with the Open Enhanced Consultant, the customer, architect, design team, Xcel Energy Account Manager, and others as appropriate. The meeting will cover the enhanced service options, and the roles of both the Open Enhanced Consultant and EDA Consultant. In addition, overall (both Enhanced and Basic Track) project design, energy savings goals, certification status, and

deliverables/due dates will be established. **The scope of early systems analysis will be determined at this meeting.** Any potential duplicative activities are expected to be discussed and minimized by both consultants.

- **Approval Notification** - The open enhanced consultant is responsible for contacting the EDA program manager to request acceptance into the program prior to beginning any early analysis and no later than two weeks after the kickoff meeting. The EDA Program Manager will provide an email approving acceptance, as appropriate, within one week after receipt of request.
- **Other correspondence and meetings** - following the Kickoff all correspondence and meetings will be handled accordingly by both consultants. The Open Enhanced Consultant will work with all parties throughout the early analyses Enhanced process to gather the necessary information for determining and communicating the EDA early analyses results.
- **Final Open Enhanced Deliverables** - Open Enhanced Consultant provides and shares results with the EDA consultant for modeling integration. The Open Enhanced Consultant provides the following deliverables:
 - Final Enhanced Report – Completed by the Open Enhanced Consultant, this report should include a detailed description of each analyses performed and analyses results. The final enhanced report, approved by the customer, must be sent to Xcel Energy, for the sole purpose of verifying analysis completion.
 - Invoice and Incentive Reimbursement Request Application – A detailed *Invoice* including analyses completed, dates, persons charging project, amount of time spent on analyses work, and hourly charge rate must be provided and sent to Xcel Energy. An *Incentive Reimbursement Request Application* must also be filled out and signed by the customer. This application is available at: www.xcelenergy.com/businessnewconstruction , Energy Design Assistance link. The invoice and application should be sent to Xcel Energy together.
 - The final Open Enhanced report, incentive application and invoice should be received by Xcel Energy within two weeks of final analysis completion, and no later than the beginning of the construction document project stage. An exception is the Green Building Certification submittal, which should be received by Xcel Energy within two weeks of submittal to the 3rd party verifying institution. Other exceptions may be made, but approval for an exception must be obtained from Xcel Energy in writing.
 - The incentive will be paid in approximately 4-6 weeks from invoice/application receipt.

For complete New Construction EDA Program information please visit www.xcelenergy.com/businessnewconstruction