

**Attachment B**  
**Conservation Transition Plan**  
**As Of May 31, 2012**

**Residential Program: Rebates**

*June 1, 2012* – PSE’s Residential Energy Management (REM) informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric single family existing rebate programs to internal and external partners and Jefferson County customers.

- E-mail blast to manufacturers, distributors, contractors, retailers, other utilities, and related associations.
- Internal PSE - Energy Advisor / Efficient Communities / CRMs / Other EES staff (Systems Channel) / Satellite Offices / Corp Comm.)
- Post notice on “For your Home” main page of pse.com
- Update pse.com
- Message to satellite offices to pull old collateral – follow up to be done by community representatives

*August 3, 2012* - Retailers would be required to end any PSE promotions by close of business Friday August 3rd.

*August 3, 2012* - Qualified measures must be installed/purchased on or before this date.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

**Residential Program: Low Income Weatherization**

*June 1, 2012* - PSE contacts 1) Chuck Eberdt, Energy Project, 2) Janet Anderson, Executive Director OlyCAP, and 3) Carolyn Anderson, Weatherization Coordinator OlyCAP to inform of potential program shutdown.

*July 2, 2012* - PSE notifies Department of Commerce that OlyCAP will no longer be a sponsored agency under the Energy MatchMaker program and as of midnight July 31, 2012. PSE will notify LIW Social Service Agencies that PSE Wx program is no longer serving Jefferson County the first week of August 2012.

*July 31, 2012* - All July 2012 measures completed must be entered into the LIW Online System by OlyCAP by 11:59pm 7/31/2012. Final PSE payment for July measures completed (check request) will be made the first week of August 2012.

**Residential Program: Weatherization**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric single family existing rebate programs to internal and external partners and Jefferson County customers.

Request CSG to modify eligibility business rules to excluded all Jefferson County customers effective 8/3/12.

- Request CSG sends E-mail blast to all active contractors and related associations.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be installed on or before this date.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Residential Program: HomePrint Assessments**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric single family existing rebate programs to internal and external partners and Jefferson County customers.

- Request EnergySavvy to modify eligibility business rules to excluded all Jefferson County customers effective 8/3/12.
- Send E-mail blast to all active contractors and related associations.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be installed/purchased on or before this date.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Residential Program: Manufactured Home Duct Sealing**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric single family existing rebate programs to internal and external partners and Jefferson County customers.

- Request UCONS modify eligibility business rules to excluded all Jefferson County customers effective 8/3/12.

*August 3, 2012* - Contractor is required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be installed/purchased on or before this date.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Residential Program: Contractor Alliance Network**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric single family existing rebate programs to internal and external partners and Jefferson County customers.

- E-mail blast to manufacturers, distributors, contractors, retailers, other utilities, and related associations.
- Internal PSE - Energy Advisor / Efficient Communities / CRMs / Other EES staff (Systems Channel) / Satellite Offices / Corp Comm.)
- Post notice on “For your Home” main page of PSE web.
- Update pse.com.
- Message to satellite offices to pull old collateral – follow up to be done by community representatives.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be installed/purchased on or before this date.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Residential Program: Refrigerator Replacement**

*June 1, 2012* – REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - Provide written directive to ARCA that all customers within Jefferson County must be inspected, scheduled, and serviced by close of business on Friday August 3<sup>rd</sup>.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be inspected, scheduled, and serviced before this date.

### **Residential Program: Bulb Recycling**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - Provide written directive to EcoLights and all hosting businesses within Jefferson County. PSE has three (3) active hosting locations within Jefferson County. Each hosting businesses will be required to FedEx recycling boxes by close of business on Friday August 3<sup>rd</sup>. A new box to hosting businesses within Jefferson County will not be provided.

*August 17, 2012* - Must receive PSE Recycling Boxes back by this date.

### **Residential Program: Rebate Processing**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - Provide written directive to Helgeson that all rebates for customers within Jefferson County must be PSE customer purchased by close of business on Friday August 3<sup>rd</sup>. PSE must receive invoice for Jefferson County purchases by close of business on Friday August 31<sup>st</sup>. Upon receipt, Helgeson would have six (6) weeks to issue former Jefferson County customers their appliance rebate. Within these six (6) weeks, PSE would fund the rebate to Helgeson.

*August 3, 2012* - Qualified measures must be installed/purchased before this date.

*August 17, 2012* - Retailers must provide sales/payment information to EFI for all purchases on or before this date. Data received after this date will be rejected.

*August 17, 2012* - Rebate applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Residential Program: Appliance Recycling (Refer/Freezer)**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - Provide written directive to JACO that all customers within Jefferson County must be inspected, scheduled, and serviced by close of business on Friday August 3<sup>rd</sup>.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 17, 2012* - Qualified measures must be inspected, scheduled, and serviced before this date.

### **Residential Program: Retail Field Services**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - PSE would have the removal of all POP signage by Colehour + Cohen by close of business Friday August 3<sup>rd</sup> for retail stores. During the removal, PSE would provide to store personnel both verbal and written notification about the discontinuation of PSE conservation programs in Jefferson County.

PSE will provide written notification to the BPA Simple Steps program about the discontinuation of PSE conservation programs in Jefferson County.

*August 3, 2012* - Retailers would be required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>. (N/A – No expected impact)

*August 17, 2012* – (N/A – No expected impact)

### **Residential Program: Manufacturer/Retailer Partners within Jefferson County**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family existing rebate programs.

*July 2, 2012* - Provide written notification to retailer/manufacturer partners about the discontinuation of PSE conservation programs in Jefferson County. Retailers would be required within notification to end any PSE promotions by close of business Friday August 3<sup>rd</sup>. In the notification, PSE would provide Simple Steps contact information as that is a program that they may now be eligible for.

*August 3, 2012* - Retailers would be required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be purchased before this date.

*August 17, 2012* - Retailers must provide sales/payment information to EFI for all purchases on or before this date. Data received after this date will be rejected.

### **Residential Program: Single Family New Construction**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric single family new construction rebate programs.

### **Residential Program: Multi-Family New Construction**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric Multifamily New Construction rebate programs.

*July 2, 2012* - N/A - No expected impact. No current county work, no new customers anticipated.

*August 3, 2012* - N/A - No expected impact. No current county work, no new customers anticipated.

*August 17, 2012* - N/A - No expected impact. No current county work, no new customers anticipated.

### **Residential Program: Multi-Family Retrofit Program**

*June 1, 2012* - REM informs internal and external partners of potential sunset of all electric multifamily existing rebate programs.

*July 2, 2012* - REM announces discontinuation of all electric multifamily existing rebate programs to internal and external partners and Jefferson County customers.

#### **NOTIFICATION TO CUSTOMERS WITH EXISTING CONTRACTS (EITHER UNSIGNED OR FULLY EXECUTED)**

- Notify holders of existing contracts (signed or unsigned) that, if filing is approved, payments will be made for projects completed with all final documentation submitted to PSE through 12/31/12, but Termination Clause conditions in the agreement will require repayment of nearly the full grant amount to PSE in April 2013 per targeted PSE/Jeff Co PUD transfer date.

#### **NOTIFICATION TO CUSTOMERS WITH PROJECTS IN DEVELOPMENT**

- Notify customers currently working with an EME to develop a custom grant contract that, if filing is approved, custom grant payments will still be made through 12/31/12 if a complete project submittal is received by PSE by 8/3/12, but Termination Clause conditions in the agreement will require repayment of nearly the full grant amount to PSE in April 2013 per targeted PSE/Jeff Co PUD transfer date.

- Provide written directive to Ecova, ARCA, and Arrow Insulation that all customers within Jefferson County must be inspected, scheduled, and serviced by COB Friday August 17<sup>th</sup>, with exception to commercial measures.
- E-mail blast to manufacturers, distributors, contractors, retailers, other utilities, and related associations.
- Internal PSE - Energy Advisor / Efficient Communities / CRMs / Other EES staff (Systems Channel) / Satellite Offices / Corp Comm.)
- Post notice on “For your Home” main page of PSE web.
- Update pse.com/multifamilyretrofit.

#### **PSE STOPS ACCEPTING CUSTOM GRANT APPLICATIONS**

- Stop accepting all Custom Grant applications. Customers & trade allies who submit applications (via fax, e-mail or postmarked) after 8/3/12 will receive notification letter that PSE has stopped offering energy efficiency incentives to Jefferson Co customers.

*August 3, 2012* - Contractors are required to end any PSE promotions by close of business Friday August 3<sup>rd</sup>.

*August 3, 2012* - Qualified measures must be installed on or before this date, with exception to commercial measures.

*August 17, 2012* - Rebate/Payment applications for all installations must be received on or before this date. Rebate applications received after this date will be rejected.

### **Commercial Program: Rebates**

#### **NOTIFICATION OF FILING AND POTENTIAL SUNSET OF PROGRAMS:**

*June 1, 2012* - BEM informs internal and external partners of potential sunset of all electric commercial existing rebate programs as appropriate.

*July 2, 2012:*

- Notify trade allies (mail merge list of participating contractors) that rebate offerings will end effective August 3, 2012 and 30 days remain to submit projects for pre-approval:
  - Commercial Rebate applications received on or after August 3, 2012 will not be approved.

*August 3, 2012:*

- Stop all Commercial Rebate pre-approvals (applications received via fax, e-mail or postmarked prior to August 3, 2012 will be accepted).
- Notify trade allies & customers with accepted applications for pre-approved projects that payment must be processed within 30 days:
  - Project(s) must be completed & payment request received by PSE not later than August 17, 2012.
  - PSE will process payments by August 31, 2012.
- Post updated Commercial Rebate application forms to PSE.com that indicate Jeff Co customers are ineligible for energy efficiency incentives.

*August 17, 2012:*

- Last day PSE accepts payment requests for pre-approved Commercial Rebates.

#### **TERMINATION OF REBATES NOT REQUIRING PRE-APPROVAL:**

*July 2, 2012:*

- Notify trade allies (mail merge list of participating contractors as well as electrical supply houses, HVAC distributors, and others likely to business in Jefferson Co) that rebate offerings will end effective August 3, 2012 and 30 days remain for equipment to be purchased and/or installed to qualify for a PSE incentive:
  - Equipment purchased and/or installed on or after August 3, 2012 will not be eligible for incentives.
  - PSE will continue to accept applications for rebates that do not require pre-approval through August 17, 2012, provided the equipment was purchased and/or installed prior to August 3, 2012.

- Post communications to PSE.com that PSE will continue accepting applications through August 17, 2012 for Commercial Rebates that do not require pre-approval for equipment purchased and/or installed prior to August 3, 2012.

*August 17, 2012:*

- Last day PSE accepts applications for Commercial Rebates not requiring pre-approval.

## FINAL NOTIFICATION THAT COMMERCIAL REBATE PROGRAMS ARE CLOSED

*August 17, 2012:*

- Send notifications to all contractors & customers who did not submit payment requests for pre-approved projects that PSE rebate programs are closed and payment cannot be made.
- Remove communications from PSE.com that PSE will continue accepting applications through August 17, 2012 for Commercial Rebates that do not require pre-approval for equipment purchased and/or installed prior to August 3, 2012.
- Customers applying for rebates after this date to receive notification letter that PSE has stopped offering energy efficiency incentives to Jefferson Co customers.

### **Commercial Program: Custom Grants**

*June 1, 2012* - BEM informs internal and external partners of potential sunset of all electric commercial existing rebate programs as appropriate.

*July 2, 2012:*

- Notify holders of existing Conservation Grant Agreement contracts (either signed or unsigned) that payments will be made for projects completed with all final documentation submitted to PSE through December 31, 2012, but Termination Clause conditions in the agreement will require repayment of nearly the full grant amount to PSE in April 2013 per targeted PSE/Jeff Co PUD transfer date.
- Notify customers currently working with an Energy Management Engineer to develop a custom grant contract that all project documentation must be received by August 2, 2012 in order to qualify for a custom grant incentive. Custom grant payments will still be made for projects completed with all final documentation submitted to PSE through December 31, 2012, but Termination Clause conditions in the agreement will require repayment of nearly the full grant amount to PSE in April 2013 per targeted PSE/Jeff Co PUD transfer date.
- Notify 3rd party contracted program provider for Energy Smart Grocer of sunset of efficiency programs in Jefferson Co effective August 3, 2012 & inform them Energy Smart Grocer projects (delivered under E250) in progress in Jefferson Co must be completed by August 2, 2012 with final project invoicing and documentation submitted for payment by August 17, 2012.

*August 3, 2012* - PSE STOPS ACCEPTING CUSTOM GRANT APPLICATIONS

- Stop accepting all Custom Grant applications. Customers & trade allies who submit applications (via fax, e-mail or postmarked) on or after August 3, 2012 will receive



notification letter that PSE has stopped offering energy efficiency incentives to Jefferson Co customers.

- Post updated Custom Grant program information & application forms to PSE.com that indicates Jeff Co customers are not eligible for incentives (C/I Retrofit, New Construction, Comprehensive Commissioning, Simplified Building Tune-ups, Data Center Efficiency Program, Industrial Systems Optimization Program).

Notify key customers that PSE C/I efficiency programs are no longer available in Jefferson Co.

#### *December 31, 2012* LAST DATE TO ACCEPT FINAL DOCUMENTATION

- Last day to accept final documentation for Custom Grant payment processing.
  - Send notifications to all holders of Custom Grant agreements (signed or unsigned) who did not submit payment requests for pre-approved projects that PSE incentive programs are closed and custom grant payments will not be made since PSE will be required to recollect the majority of funds in early 2013 due to termination clause.

#### **Commercial Program: Resource Conservation Manager**

*June 1, 2012* - BEM informs internal and external partners of potential sunset of all electric commercial existing rebate programs as appropriate.

*July 2, 2012* –

Notify RCM program participant(s) that RCM support services will terminate effective August 3, 2012. Prior to August 3, 2012 customer should prepare for the program end by:

- Downloading and transferring energy usage data from PSE's Energy Interval Service before service is discontinued on August 3, 2012.
- Request a final conference call between PSE's RCM program staff and Jefferson County RCM participants to discuss data transfer and strategies for continuing the RCM program absent PSE support. This call should be held prior to August 3, 2012.

#### *August 3, 2012* - PSE INITIATES RCM PROGRAM CONTRACT CLOSEOUT

Notify RCM program participant that:

- Support for Utility Manager Database, including technical support provided by Ecova, has been suspended & July 2012 will be last monthly data file provided to Jefferson Co.
- The customer will retain the standard PC-based Utility Manager Software and all data entered to date.
- Access to Energy Interval Service has been discontinued.
- PSE will perform a final savings analysis through July 31, 2012 and provide to the customer.
- Content on PSE.com updated to indicate RCM support services are not available to Jefferson Co customers.

*August 17, 2012* - FINAL PSE DELIVERABLE

- PSE RCM Program Manger prepares final savings true-up, processes in CSY & notifies customer of final savings analysis results by this date.