



Self-Direction Policy

November 16, 2005

Self-Direction Policy Background

- First adopted 2002
- Addressed large energy user that has self-directed efficiency investments and now seeks an ETO incentive.
- For example . . .

Existing sites, self-directed



Each project qualifies for Energy Trust incentives or self-direction, but not both

New project ✨, new site



- Self-direct new project: no incentive
- Self-direct at other sites: still eligible for 100% incentive at new site

New project, existing site



- Self-direct new project: no incentive
- Stop self-directing at new project site for 36 mos: 100% incentive for new project
- Continue to self-direct existing project at site: 50% incentive for new project

Proposed changes

- Clarify intention of original policy:
 - energy user must choose between self-direction and incentive for a project (can't do both);
 - policy addresses cases in which energy user self-directs one project and seeks incentive for another.
- Authorize ETO staff to pay full (not 50%) incentive for measures with modest savings/costs where policy would frustrate program objectives.
- Authorize staff to decide whether to seek recovery of incentives if self-direction agreement is breached.