$PROJECT\_NAME$  
$PROJECT\_LOCATION$

Xcel Energy’s Energy Design Assistance Program

$REPORT\_TYPE$

$DATE$

**Prepared for:**

$CLIENT\_NAME$

$CLIENT\_BUSINESS\_NAME$

$CLIENT\_ADDRESS$

$CLIENT\_PHONE$

$CLIENT\_EMAIL$

**Prepared by:**



Xcel Energy

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$CONSULTANT\_NAME$

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Energy Design Assistance Program Process & Timeline

Xcel Energy’s Energy Design Assistance (EDA) process is designed to assist the Owner and Design Team in making decisions concerning energy-efficiency measures for the project. The main steps are:

|  |  |  |
| --- | --- | --- |
| **Construction stage**  **(ESTIMATE)** | ENERGY DESIGN ASSISTANCE STATE | **DATE** |
| **aPPLICaTIon**  **Design phase** | Step 1: APPLICATION  Complete application  Xcel Energy accept/reject of application | **$APPROVAL\_DATE$** |
| **PRE/EARLY SCHEMATIC DESIGN PHASE** | Step 2: INTRODUCTION  Introductory meeting   * EDA Program overview * Energy efficiency measure discussion   Begin collection of building and incremental cost data  Energy Consultant (EC) submits introductory report | **$INTRO\_DATE$** |
| **Schematic Design phase** | Step 3: PRELIMINARY ENERGY ANALYSIS (PEA)  Early massing, HVAC, daylighting (Enhanced Track only)  Preliminary energy analysis meeting   * Review of analysis results in PEA report * Selection of measures to be included in final energy analysis   EC submits PEA report | **$ PEA\_DATE $** |
| SD completion | |  |
| **Design Development phase** | Step 4: FINAL ENERGY ANALYSIS (FEA)  Final energy analysis meeting   * Review of updated whole building analysis in FEA report * Review of program incentives * Introduction to verification process   Customer selects an energy design alternative, showing an intent to move forward with selected measures  EC submits FEA report | **$BUNDLE\_DATE$** |
| DD completion | |  |
| **Construction Document phase** | Step 5: CONSTRUCTION DOCUMENT (CD)  Customer sends final design CDs to Measurement & Verification Company (MVC)  **Measurement & Verification Company:**   * Confirms measures included in final design documents * Sends to EC to update model   **Energy Consultant:**   * Submits CD report with updated model results and incentive * EC complete green certification docs (Enhanced Track only)   Design team completes documentation for fee reimbursement | **$CD\_DATE$** |
| **CD Completion** | |  |
| **Construction** | **Construction Occurs. Estimated construction completion date** |  |
| **Construction ends** | |  |
| **Post-Occupancy** | MVC conducts on-site measurement and verification. Sends M&V results to EC to update model  EC submits M&V report with updated model results and incentive EDA project complete. | **$MV\_DATE$** |
| **Incentive payment to customer is received approximately two months post-verification** | | |

Xcel Energy, through the EDA program, has qualified energy consultants to provide our customers with a service that includes an integrated design process. This integration includes using an energy model to compare building energy scenarios and estimate energy savings. The energy model itself is an instrument to project results and review different energy efficiency opportunities. The results of these models belong to Xcel Energy and their customers as participants through the EDA program.

Xcel Energy customers participating in the EDA program may distribute the results of their model to anyone they choose.  Xcel Energy will not release this information unless written permission from the customer has been obtained.  Xcel Energy also cautions the use of these reports; data is based on an analysis done for a specific time frame.  Buildings naturally adjust as occupancy reaches its full potential, causing variations from pre-construction data.

Energy Design Assistance Incentives

Xcel Energy provides rebates based on a Pay For Performance (P4P) structure.  P4P calculates the customer rebate based on total energy saved (kW, kWh, Dth) relative to the EDA Baseline model.  The design team rebate is based on project size.  Energy consultants will be paid based on a percentage of the owner’s final incentive.  More information on P4P payments and payment schedule is available at [www.xcelenergy.com/businessnewconstruction](http://www.xcelenergy.com/businessnewconstruction).

Energy Design Assistance projects must implement a combination of energy saving measures that meet or exceed Xcel Energy’s required minimum annual energy savings thresholds in order to receive incentives. Requirements include:

Basic and Express Tracks: 15% kW savings reduction, and 15% natural gas savings reduction relative to code.

Enhanced Track (Early Analysis/Certification): 30% kW savings reduction, and 15% natural gas savings reduction relative to code.

Note: The EDA Enhanced track is for customers who have a more aggressive energy goal and want to begin analysis in pre-design. By taking a look at earlier design options there is greater flexibility to make decisions. Additional analyses covered in the Enhanced track include 3rd party verified sustainable green building certification (ex. U.S. GBC’s Leadership in Energy and Environmental Design (LEED-NC), massing, daylighting, lighting, and/or early HVAC.

If the Enhanced Track requirements are not met, Early Analyses and Green Building Certification submittal work, such as LEED EA Credit 1, will not be completed or rebated.

The building must be a natural gas customer of Xcel Energy to receive the natural gas incentives. If the building is on transport gas service at the time of the introductory meeting, natural gas incentives will not apply.

Design Team Responsibilities

The EDA program provides a reimbursement to the Design Team for participation at formal meetings, transfer of building architectural/ engineering design and submittal information to Xcel Energy consultant, and development of applicable energy conservation strategies’ incremental costs.

Project Summary

|  |  |
| --- | --- |
| **Project Name** | **$PIF\_PROJECT\_NAME$** |
| Xcel Energy Project # | $XPF\_XCEL\_PROJECT\_NUMBER$ |
| Location | $PROJECT\_LOCATION$ |
| Building Type | $PIF\_BUILDING\_TYPE$ |
| Conditioned Floor Area | $PIF\_FLOOR\_AREA\_CONDITIONED$ |
| Unconditioned Floor Area | $PIF\_FLOOR\_AREA\_UNCON$ |
| Above-Grade Stories | $PIF\_STORIES\_ABOVE\_GRADE$ |
| Below-Grade Stories | $PIF\_STORIES\_BELOW\_GRADE$ |
| Electricity Provided by Xcel | $APP\_BOOLEAN\_ELECTRICITY$ |
| Natural Gas Provided by Xcel | $APP\_BOOLEAN\_GAS$ |
| District Heating Gas Provided by Xcel | $APP\_BOOLEAN\_DH$ |
| District Cooling Electricity Provided by Xcel | $APP\_BOOLEAN\_DC$ |
| EDA Baseline | $RULE\_BASELINE$ |
| Track (Basic, Express or Enhanced) | $PIF\_TRACK$ |
| Certification (Enhanced Only) | $APP\_CERTIFICATION\_GOAL$ |
| Early Analysis (Enhanced Only) | $PIF\_EARLY\_ANALYSIS$ |
| Estimated Savings (vs. baseline) |  |
| Demand (kW) | $ESTIMATED\_KW$ |
| Energy (kWh) | $ESTIMATED\_KWH$ |
| Gas (Dth) | $ESTIMATED\_DTH$ |
| Estimated Construction Completion Date | $PIF\_COMPLETION\_DATE\_ESTIMATE$ |
| Estimated 80% Occupancy Date | $PIF\_OCCUPANCY\_DATE\_ESTIMATE$ |
| Estimated Verification Date | $PIF\_VERIFICATION\_DATE\_ESTIMATE$ |

|  |  |
| --- | --- |
| **Customer incentive calculations are based on the following dollar amounts** | |
| Demand ($/kW) | $ $RULE\_ELEC\_DEMAND\_INCENTIVE$ |
| Energy ($/kWh) | $ $RULE\_ELEC\_ENERGY\_INCENTIVE$ |
| Gas ($/Dth) | $ $RULE\_GAS\_ENERGY\_INCENTIVE$ |

Project Participants

Project participants include:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Company | Role | E-Mail | Phone | In Attendance |
| $CONTACT\_NAME$ | $CONTACT\_COMPANY$ | $CONTACT\_ROLE$ | $CONTACT\_EMAIL$ | $CONTACT\_PHONE$ |  |

Project Goals & Analysis Scope

Description of project goals, scope of analyses and EDA track recommendation

Measure List

The following energy efficiency measures were discussed with the Design Team to consider for analysis. This list will be further expanded during analysis.

* Architectural
  + - List
* HVAC
  + - List
* Domestic water
  + - List
* Lighting
  + - List
  + Plug load & equipment
    - List
  + Other categories (list)

Next Steps & Action Items

* Action Item:
  + Assigned to: Who
  + Due Date: Date
* Action Item:
  + Assigned to: Who
  + Due Date: Date
* Next meeting: Date