

CPA Power Response Battery Rebate Application Handbook

Program Summary

The CPA Power Response Battery Rebate Program provides incentives for medium and large non-residential customers to purchase and install battery energy storage systems (BESS). Customers participating in the Battery Rebate program must enroll at least 50% of the capacity of the BESS in the CPA Power Response Program to receive incentives.

This handbook covers the following topics:

1. Incentive Levels
2. Program Schedule
3. Eligibility Requirements and Selection Criteria
4. How to Apply
5. Project Milestones
6. Technical Requirements
7. Terms and Conditions

Appendix A: Determining Minimum Power Response Capacity Commitment

Appendix B: CISR Instructions

For more information on the Power Response program, and to access all program application documentation please visit cleanpoweralliance.org/compowerresponse.

1. Incentive Levels

Battery Rebate incentives are based on the system energy storage capacity. The battery energy storage system must have a rated power of at least 10kW and a minimum energy storage capacity of 40 kWh. Incentives will be capped at 550 kWh of energy storage capacity.

Applicants must also enroll in the CPA Power Response program with a capacity commitment of at least 10kW, and at a level so at least 50% of the incentivized energy capacity of the system is available for program events. Additional detail on determining the minimum capacity commitment for the Power Response Program can be found in Appendix A.

Category	Incentive Amount	Minimum System Energy Capacity (kWh)	Maximum System Energy Capacity Eligible for Incentive	Maximum Total Incentive per Applicant ¹
Storage w/ Investment Tax Credit (ITC) (customer with solar PV-charged BESS)	\$125/kWh	40 kWh	550 kWh	\$68,750
Storage w/o ITC	\$175/kWh	40 kWh	550 kWh	\$96,250

1. Applicants with larger systems may apply, but the incentive will be capped at this value, or at the total cost of the system less any SGIP or other incentives awards.

2. Program Schedule

Power Response Battery Rebate applications will be reviewed on a rolling basis, with application reviews starting on December 17th, 2020. Applications will be accepted until funds are exhausted for each rebate category, or until otherwise noted. The program website will provide an updated status of each rebate category and whether applications are still being accepted for the category.

Rebate Schedule Targets¹

Application released	10/28/2020
New Questions and Answers provided on program website	11/24/2020
Application review begins	12/17/2020
Notice of award	1/17/2021 for applications received by 12/17/20, or 1 month following application submittal after that
Incentive Milestone 1. Complete enrollment in the CPA Power Response Program and provide required additional project implementation data including documentation of equipment specifications, project costs, and implementation schedule.	3 months following notice of award
Incentive Milestone 2. Complete project interconnection with SCE and provide a copy of the interconnection agreement to CPA.	6 months following notice of award
Incentive Milestone 3. Complete project installation and integration with the Power Response Program. Integration will be verified through a test event by the Power Response Demand Response Provider (DRP) Olivine, Inc.	One year following notice of award

Question and Answer Period

CPA will accept questions about this application emailed to powerresponse@cleanpoweralliance.org. CPA will respond by email to all applicants that submit questions and will post written responses to all questions on the Battery Rebate website at: <https://www.olivinecommunity.com/cpa/battery-rebate/answers/>. A first round of new questions and answers will be posted by 11/24/2020.

3. Eligibility Requirements and Selection Criteria

Applicants must meet the following minimum eligibility requirements to be considered for an award:

1. Must be a medium or large commercial or municipal CPA customer.
2. Proposed battery energy storage system must be grid-connected and must not be used exclusively for backup power.

¹ Schedule subject to change. See below for additional information about milestone requirements and timing of incentive payments.

3. Proposed battery energy storage system must have a rated power of at least 10kW and a minimum energy storage capacity of 40 kWh. Incentives will be capped at 550 kWh of energy storage capacity.
4. Applicants must enroll in the Power Response program with a capacity commitment of at least 10kW, and at a level where at least 50% of the incentivized energy capacity of the system is available for program events. (CPA can provide technical assistance if needed to evaluate proposed project capacity availability.)
5. Customer must submit a completed application and initiate enrollment in CPA Power Response.
6. The applicable service account must not be enrolled in an SCE or third-party demand response program or must be disenrolled in the other program prior to receipt of incentives.

CPA will evaluate applications and select incentive recipients based on the following considerations:

1. **Project readiness** – preference will be given to projects that demonstrate the ability to meet the milestones identified in the Program Schedule. While SGIP award is not a condition to apply, projects that have already applied for SGIP funding will have met most technical requirements for the CPA Power Response Battery Rebate program.
2. **Project size and capacity commitment** – percentage of storage system capacity available for inclusion in the Power Response Program.
3. **Equipment/vendor qualification** – preference will be given to systems included on the [SGIP Public Equipment Lists](#).
4. **Project location** – preference may be given to projects in disadvantaged communities as defined by SB 535, and to projects that reflect the diversity of CPA's customer base and geographic territory.
5. **Community benefits** – preference may be given to projects that provide additional benefits to the community such as emergency backup power for critical facilities.

4. How to Apply

To apply for the rebate incentive, complete the application available at <https://www.olivinecommunity.com/cpa/battery-rebate/>.

To be considered for the program, applicants must have initiated enrollment in the CPA Power Response Program by submitting an SCE Customer Information Service Request (CISR) form to the Program by the application due date. If a CISR has not been submitted previously, it can be submitted with the program application. Instructions for completing the CISR form are found in Appendix B. To request a CISR form, please contact program customer support at powerresponse@cleanpoweralliance.org.

Please send completed applications to: powerresponse@cleanpoweralliance.org.

If you have any questions about the application, please submit questions during the questions and answer period described under the program schedule.

Customer Details

Customer details include information on the organization applying for program incentives and the main point of contact for the customer application. The contact address may differ from the service address where the storage will be installed. The applying organization must be a CPA customer.

Indicate whether the organization is tax-exempt or not. This is used to assess the project in the correct incentive category. Applicable tax-exempt organizations include²:

1. Local governmental agency - Public Contracts Code § 22161(f)
2. State governmental agency - Government Code §11000
3. Educational institution - Any institution that would otherwise be eligible for funding through the California Clean Energy Jobs Act (Proposition 39), or a college or university accredited to operate in California.
4. Non-profit organization - An organization that is registered and in good standing with the California Secretary of State as a domestic non-profit entity.

Project Site Information

Project site information includes information on the site where the battery energy storage system will be installed. This site must be an active Clean Power Alliance (CPA) medium business, commercial, industrial, or municipal customer account in CPA's service territory taking service under a non-residential rate. Information in this section should match your CPA bill. Information on where to find the applicable information on your CPA bill can be found in the CISR instructions in Appendix B.

Proposed Battery Energy Storage System Information

Applicants must include a proposed energy storage capacity in kWh for incentive calculations, even if the specific system has not been determined. An awardee may reduce the system size (down to the program minimum of 40kWh) after an award and will receive a lowered incentive based on the new system size.

Battery energy storage capacity should be the useable battery capacity of the system, including any discharge losses, based on the following formula:

- Total Energy Capacity (kWh) = # Batteries x Amp-hour Rating of Each Battery x System Voltage x Inverter/Converter Efficiency (%)

² Adapted from the 2020 SGIP Handbook, section 4.1.1.1

Applicants must enter a proposed capacity commitment for the Power Response Program. See Appendix A for details on how to calculate the minimum capacity commitment for a given system size.

If known, enter the system manufacturer and model number of the system to be installed as part of the program. If the system is on the SGIP Public Equipment list please enter this information as it appears on that list. The SGIP Public Equipment Lists can be found at <https://www.selfgenca.com/home/resources/> under “Verified Equipment Lists”. If the system is unknown or subject to change, please enter TBD.

Project Financial Information

This section provides information on project costs and financing. Please indicate the total projected or budgeted project cost. Project costs can include³:

1. Engineering feasibility study costs.
2. Engineering and design costs.
3. Environmental and building permitting costs.
4. Equipment capital costs.
5. Construction and installation costs. For projects in which the equipment is part of a larger project, only the construction and installation costs directly associated with the installation of the energy equipment is eligible.
6. Interconnection costs, including:
 - a. Electric grid interconnection application fees.
 - b. Metering costs associated with interconnection.
7. Warranty and/or maintenance contract costs associated with eligible project cost equipment. The cost of this component is capped at 10% of the total claimed project costs.
8. System metering, monitoring and data acquisition equipment.
9. Sales tax and use tax.
10. Cost of capital included in the system price by the vendor, contractor or subcontractor (the entity that sells the system) is eligible if paid by the System Owner.

Include information on all other incentives that have been awarded or for which an application has been submitted for this storage project, including from the California Self-Generation Incentive Program (SGIP) and the Federal Investment Tax Credit (ITC).

Provide the requested incentive amount by multiplying the energy storage capacity from the Proposed Battery Energy Storage System Information multiplied by the applicable incentive rate from table of Incentive Levels above.

³ Adapted from the 2020 SGIP Handbook, section 3.2.2



Project Use

Provide the primary intended use or uses of the proposed storage equipment. For example, backup power, demand charge management, time of use rate arbitrage, and/or solar self-consumption.

If the storage equipment will provide backup power to a critical facility for the community, please indicate the type of facility and nature of the critical equipment that the storage will support. Critical facilities are facilities the community considers essential for the protection of the community, and often includes fire stations, police stations, emergency operation centers, jails, long term care facilities, health care facilities, schools, emergency shelters, utilities, communication facilities or other facilities deemed important for protecting the health and safety of the community.

Indicate if the project will replace/displace onsite GHG emissions (e.g., solar and storage replacing a diesel or natural gas generator)?

Please indicate if the project will provide any additional community benefits to the community, or if there is other information will be used that should be considered as part of the assessment process. Examples of additional community benefits might include offsetting electricity costs for a public or non-profit agency, creating air quality benefits in a Disadvantaged Community, or providing local infrastructure upgrades.

Project Timeline

Indicate the estimated completion date of the three project milestones described in Section 5.

Customer Signature

Check the box to indicate agreement with the terms and conditions listed on the contract (also found below) and have an authorized representative of the organization sign and date the application.

5. Project Milestones

There are three project milestones that must be met after an incentive award to receive the incentives. Any project not meeting the required milestones may forfeit the incentive award.

- 1. Additional Project Documentation and Power Response Enrollment:** This information is intended to confirm relevant project details, some which may not be fully known at the time of application. This includes: documentation of equipment specifications, project costs, and implementation schedule. Incentive awardees must also be fully enrolled in the Power

Response Program to achieve this milestone. This will require clearing any program conflicts identified through enrollment, signing a participation agreement confirming acceptance of program terms and conditions, and verifying the intended committed capacity for the program.

2. **SCE Interconnection Agreement Complete (50% of incentive paid):** An interconnection with SCE must be completed by this date and a copy must be submitted to the program. After confirming the receipt and acceptance of the interconnection agreement, the program will provide 50% of the incentive funds to the recipient.
3. **Equipment Installed, Operational and Integrated into Power Response Program (50% of incentive paid):** Operation and program integration will be confirmed through a test Power Response event administered by the Power Response Program administrator, Olivine, Inc. After successful participation in the test event and confirmation of achieving the program committed capacity the recipient will receive the additional 50% of incentive funds.

Additional information on required information and documentation for each milestone will be provided to incentive awardees.

6. Technical Requirements

The Battery Rebate Program is intended to fund reliable, permanent and safe systems that are professionally installed and that apply with all applicable Federal, State and local regulations. The following minimum technical requirements apply to the battery energy storage system that is installed at the facility applying for Battery Rebate funds⁴:

1. Commercial Availability
 - Commercially available, factory-new equipment is eligible for incentives. “Commercially available” means that the major system components are acquired through conventional procurement channels.
 - All eligible technologies must be certified for safety by a nationally recognized testing laboratory (NRTL).
 - If NRTL certification is not applicable for the technology type, it must be supported by a 10-year warranty as consistent with Rule 21 interconnection standards.
2. Interconnection
 - All systems receiving incentives under the Battery Rebate program must be connected to the local electric utility’s distribution system and must be installed on the customer’s side of the electric utility meter.

⁴ Adapted from the 2020 SGIP Handbook, section 4.2

- The interconnection, operation, and metering requirements for the systems shall be in accordance with SCE's rules for facility interconnections. Energy storage systems must also be configured to operate in parallel with the grid.
- 3. Permanent Installation
 - Only permanently installed systems are eligible for incentives.
 - Physical permanence is to be demonstrated by electrical, thermal and/or fuel connections in accordance with industry practice for permanently installed equipment and be secured to a permanent surface (e.g. foundation).
- 4. Ineligible Equipment
 - Any indication of portability, including but not limited to temporary structures, quick disconnects, unsecured equipment, wheels, carrying handles, dolly, trailer or platform, will deem the system ineligible.

To meet the 10kW minimum capacity requirement for the Power Response Program, battery storage systems must have a minimum system size of 40 kWh if committing 100% of the capacity to the program and 80kWh if committing 50% of capacity to the program.

7. Terms and Conditions

1. Applicants must have initiated enrollment in the CPA Power Response Program (PRP) by submitting a Customer Information Service Request (CISR) form to CPA.
2. Participants receiving Battery Rebate funds are not eligible for PRP incentives for 3 years after the installation date. Except as specified herein, Terms and Conditions of the CPA PRP shall apply.
3. Recipients must meet the following milestones to be eligible to receive incentives.
 - a. Milestone 1. Complete enrollment in the CPA PRP and provide documentation of equipment specifications, project costs, and implementation schedule.
 - b. Milestone 2. Complete project interconnection with SCE and provide a copy of the interconnection agreement to CPA.
 - c. Milestone 3. Complete project installation and integration with the PRP. Integration will be verified through a test event by the PRP DRP Olivine, Inc.
4. Fifty percent (50%) of incentive funds will be provided after Milestone 2, and 50% will be provided after verification of Milestone 3.
5. The Project Site Service Account must not be enrolled in any SCE or third-party demand response programs. Accounts enrolled in SCE or third-party demand response programs must disenroll prior to receiving Battery Rebate incentives.
6. Proposed battery energy storage system must have a rated power of at least 10kW and a minimum energy storage capacity of 40 kWh. Incentives will be capped at 550 kWh of energy storage capacity.

7. Recipients must enroll in the Power Response Program with a capacity commitment of at least 10kW, and at a level where at least 50% of the incentivized energy capacity of the system is available for program events.
8. Proposed battery energy storage system must be grid-connected and must not be used exclusively for backup power.
9. Participants must meet CPA PRP requirements for 5 years. If the CPA PRP is terminated for any reason, participants agree to allow CPA to control the storage system up to the capacity commitment level under the program rules for 5 years after the date the storage system became operational and participants began receiving Battery Rebate incentives from CPA.
10. Incentive awards shall be capped at the lesser of 1) the cost of the battery installation minus any other installation incentives received (e.g., ITC, SGIP) by the participating project; or 2) \$68,750 for projects that qualify for ITC and \$96,250 for projects that do not qualify for ITC.

Appendix A: Determining Minimum Power Response Capacity Commitment

The Battery Rebate Program requires that recipients must enroll in the Power Response program with a capacity commitment of at least 10kW, and at a level where at least 50% of the incentivized energy capacity of the system is available for program events. The capacity commitment, in kW, is the estimated capacity of the system for a four-hour period, measured in kW, between 4pm and 9pm on weekdays.

To determine the minimum capacity commitment for a particular system size, take the energy storage capacity, in kWh, and multiply by 50%. This is the energy capacity that must be available to the program between 4pm and 9pm on weekdays. To convert this energy capacity to kW, simply divide the capacity by the maximum event length which is 4 hours. This will give the minimum kW capacity the system must discharge over a four hour program event.

Minimum Power Response Program Committed Capacity = 50% x System Energy Storage Capacity (kWh) / 4 hours

The following table provides the minimum capacity requirements for example system sizes. Note that smaller systems may only be able to meet the 10 kW program minimum by providing more than 50% of the system capacity. The table also provides the capacity commitment if 100% of the system is allocated for the program during program hours.

System Energy Storage Capacity (kWh)	Minimum Power Response Program Committed Capacity (kW) for 50% Availability During Program Hours	Maximum Available Power Response Program Committed Capacity (kW) for 100% Availability During Program Hours
40 kWh	N/A ¹	10 kW
80 kWh	10 kW	20 kW
120 kWh	15 kW	30 kW
160 kWh	20 kW	40 kW
200 kWh	25 kW	50 kW
400 kWh	50 kW	100 kW
550 kWh	68 kW	137 kW

1. System would not meet 10kW program minimum at 50% capacity.

Appendix B: CISR Instructions

The CISR form is an SCE form that allows you to authorize the program administrator, Olivine, Inc., to access customer information required for program participation, including facility metered electricity usage data. This data is necessary in order to verify your eligibility, approve your committed capacity and track your program performance and incentive payments. This is a necessary and required step for enrollment in the program. Attached to this document you will find a partially filled in CISR form that includes Olivine's Demand Response Provider (DRP) information. The CISR Form, under CPUC Rule 24 does enable the DRP to register the customer in the wholesale market. However, registration will not occur until the customer has been enrolled in the Power Response program and a Participation Agreement has been executed.

The CISR form must be signed by someone from your company that is authorized by SCE to make changes to the account.

Handwritten CISR forms are not recommended, because they often are not accepted by SCE for being illegible or incomplete. Therefore, it is preferred that CISR forms be pre-populated by program representatives or that Olivine provide a CISR for digital completion and signature via AdobeSign. To request a CISR form via EchoSign, please contact program customer support at powerresponse@cleanpoweralliance.org.

Please complete the following sections of this form:

1. Customer information
 - a. **Customer Name According to SCE Records:** The company name that appears on the company electricity bill
 - b. **Contact Name (if different from above):** The name of the person to contact regarding the program. The contact person can be different than the authorized representative that signs the CISR form.
 - c. **Contact Information:** email and phone number of program contact
2. DRP Authorization (This section should already be pre-filled)
 - a. Check the box indicating you do hereby "Authorize" Olivine as your DRP
 - b. **Name of Primary DRP:** Olivine, Inc.
 - c. **Fed Tax ID:** Not required – leave blank
 - d. **Rule 24 ID:** 15843734
 - e. **Email Address:** R24@R24LIMA.OLIVINEINC.COM (this is for SCE use only)
 - f. **Phone Number:** 510-345-3040
3. Access to the following Service Accounts:
 - a. **Service Address:** Address of the facility with the DER installed. This must match the service address for this location on the utility bill and may differ from the billing address.
 - b. **Service City:** City of the facility with the DER installed. This must match the service address for this location on the utility bill and may differ from your billing address.

- c. **Service Account Number:** Your SCE Service Account ID number (SAID) for this location as found on utility bill. Note, this is different from your customer ID, facility ID and meter number
 4. Timeframe of Authorization
 - a. **Please Check:** “Begin today and continue indefinitely or until revoked by the customer or DRP.” While this is not required for assessment it is required for participation in the program. If for some reason, the customer does not complete enrollment in the program Olivine, as the DRP, will process a revocation form.
 5. Customer must sign and date the form under section D, Customer Agreement. Only sign this section. The form must be signed by someone authorized on the utility account as indicated above.
 6. If filling out a physical CISR form (i.e. not through EchoSign): scan and email the form to CPA account representative or powerresponse@cleanpoweralliance.org.

For reference figures below show a sample CPA Bill, and where to get the information for the CISR form.



For billing and service inquiries
1-800-990-7788
www.sce.com

Your electricity bill

Customer Name **Happy Customer** / Page 1 of 6

Customer Account [REDACTED] Date bill prepared 11/08/19 Amount due [REDACTED]
Due by 11/27/19

Your account summary

Previous Balance	\$36,627.90
Payment Received 10/18/19	-\$36,627.90
Balance forward	\$0.00
Your new charges	\$34,229.64
Total amount you owe by 11/27/19	\$34,229.64

Service Account IDs (SAID)
Include only the SAID with the DER equipment

Summary of your billing detail

Service account	Service address	Billing period	Your rate	New charges
[REDACTED] X-XXX-XXX-XX	123 Clean Power Ln Los Angeles, CA	10/03/19 to 11/04/19	TOU-EV-9 (SCE)	[REDACTED]
[REDACTED] X-XXX-XXX-XX	125 Clean Power Ln Los Angeles, CA	10/03/19 to 11/04/19	TOU-EV-SEC-9	[REDACTED]

Service Account Address [REDACTED]

Things you should know

DIRECT PAYMENT INFORMATION.....

We will automatically debit the total amount due, \$34,229.64, from your checking account on or after 11/18/19. Your bank may place a hold on these funds prior to that date. Thank you!

(14-574)

Tear here

If your contact information has changed please complete the form on the reverse side and return the stub below.

Tear here



Customer account [REDACTED]

Amount due by 11/27/19 [REDACTED]

We will automatically debit the total amount due [REDACTED] from your checking account on or after 11/18/19. Your bank may place a hold on these funds prior to that date. Thank you!