

# BALANCED ROCK ENERGY

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BETTER DECISION MAKING & LESS ENERGY SPENDING



# Agenda

## **Balanced Rock Energy – Introduction/Overview**

### **Procurement**

- Steps of the Process
- Live Auction
- Post Procurement Tasks

### **Energy Data Analytics / Dashboard**

- Data Retrieval
- Dashboard Access
- Bi-Directional Interface w Energy Star
- Energy to Care

### **Additional Services**

- Incentive Programs (Solar/Demand Response/Efficiency)
- Onsite Generation



# Overview

## LED BY DAN JOYCE

- Over fifteen years of experience
- Hundreds of clients
- Thousands of contracts
- Billions of kWh's of power

**CERTIFIED  
ENERGY PROCUREMENT  
PROFESSIONAL**



# Overview



PROVIDENCE  
COLLEGE



**'TORAY'**

Innovation by Chemistry



Dartmouth-  
Hitchcock



**BENTLEY**  
UNIVERSITY



**MassMutual**  
FINANCIAL GROUP®



BROWN



**APPLIED**  
MATERIALS®

**REDUCE SPEND &  
MANAGE COSTS**

for some of the largest  
energy users



**First Data**™



**Balanced Rock**  
ENERGY

## **Guiding Principles**

# **Core Values**

**TRANSPARENCY**  
**INTEGRITY**  
**HONESTY**

**LIQUIDITY**  
**INTELLIGENCE**  
**UNBIASED RECOMMENDATIONS**



**Guiding Principles**

# **Core Services**

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**ENERGY  
PROCUREMENT**

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**ENERGY  
ANALYTICS**

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**UTILITY  
INCENTIVE  
PROGRAMS**







THE ENERGY MARKETPLACE CAN BE

**COMPLICATED**

# WE CAN HELP

$$E = P \times Q - i$$

- ▶ Competitive sourcing of supplier agreements
- ▶ Reduce usage via energy analytics and efficiency measures
- ▶ Maximize all available incentive programs (iso, state, utility)
- ▶ On-site generation of power & leverage of existing energy assets





# Procurement

- **Steps of the Process**
- **Live Auction**
- **Post Procurement Tasks**



# **Step 1**

## **DISCOVERY**

**Collect copies of utility & supply invoices**

**Collect copies of supply agreements**

**Complete utility authorizations**

**Review on-site generation capabilities**



## DISCUSS & DEVELOP BUYING STRATEGY

Tolerance for Risk

Budget Certainty / Best Price

Types of Products

- a. Market Based Pricing / Index
- b. Fixed Adder w Block Purchasing
- c. Percentage Fixed (ex. 50%)
- d. All in Fixed w Min 25% Bandwidth



# Step 3

## INTERNAL EVALUATION OF FINDINGS & RECOMMENDATION

**Market Conditions (MIP)**

**Existing Agreements**

**Estimates of New Pricing Results**

**Recommendation of Next Steps**



## DEVELOP REQUEST FOR PRICING

### RFP Architecting

Products / Term Lengths / Sequence






**Confirm All Customer Information**

**Review Supplier Agreements**

**Schedule Sealed Bid Round of Pricing**



### Supplier Liquidity

	EDF Energy
	Engie Resources
	Constellation
	First Point Power
	Liberty Power

	Champion Energy Services
	Direct Energy
	Calpine Energy Solutions
	NextEra Energy Resources





## SEALED BID ROUND OF PRICING

**Release RFP to All Suppliers**

**Evaluate Results**

Pricing Products

Supplier Competitiveness

Formulate Decisions

Review Supplier Agreements



# Step 5

## RUN LIVE AUCTION

**Executable Round of Pricing**

**Auctions Run 10:00am – 12:00pm**

**Evaluate Results / Make Decisions**

**Execute Agreements as Applicable**



## Energy Procurement

### RFQ Details



RFQ #58 - 12 Month All In Fixed Price

RFQ Details

Contract Information

Contact Information

Customer Information

Documents

Suppliers

Quote Submission

Start Date	Commodity Type	Country	State
06/01/20	Electricity	USA	Connecticut
Delivery Point	Utilities		
N/A	EverSource CT		
Procurement Amount		Number of Meters	
20,000,000 kWh		10	
Gas Price Assumption			
N/A			
Payment Term	Bill Type		
30	Utility Consolidated Billing		

Show Guidelines


Show Q&A

## Step 5 RUN LIVE AUCTION



## Energy Procurement

### RFQ Details

 RFQ #59 - 12 Month Block and Index

RFQ Details

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Show Guidelines

Show Q&A

## Step 5 RUN LIVE AUCTION



## Energy Procurement

### RFQ Architecting

RFQ Type	Commodity	RFQ #	RFQ Name Customer	Start Time End Time	Product Type	Contract Start Date	Contract Terms	State	Utility
O	⚡	54	12 Month All In Fixed Price Test Customer	04/06/20 10:00 AM 04/06/20 11:45 PM	Fixed 12 Month All In Fixed Price	06/01/20	12	CT	ES CT
O	⚡	55	24 Month All In Fixed Price Test Customer	04/06/20 10:00 AM 04/06/20 11:50 AM	Fixed 24 Month All In Fixed Price	06/01/20	24	CT	ES CT
O	⚡	56	12 Month Block and Index Test Customer	04/06/20 10:00 AM 04/06/20 11:55 AM	Block & Index 12 Month Block and Index	06/01/20	12	CT	ES CT
O	⚡	57	24 Month Block and Index Test Customer	04/06/20 10:00 AM 04/06/20 12:00 PM	Block & Index 24 Month Block and Index	06/01/20	24	CT	ES CT

## Step 5 RUN LIVE AUCTION



## Energy Procurement

### Executable Round of Pricing



## Step 5 RUN LIVE AUCTION





# Step 6

## MARKET WATCH

**Utilize market triggers to track wholesale pricing over the life of the agreement**

Layer In Additional Hedges

Assists w Proactive Procurement

**Help to take advantage of buying opportunities**

**Set up Billing & Payment Methods**



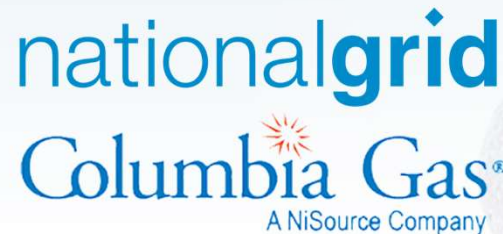
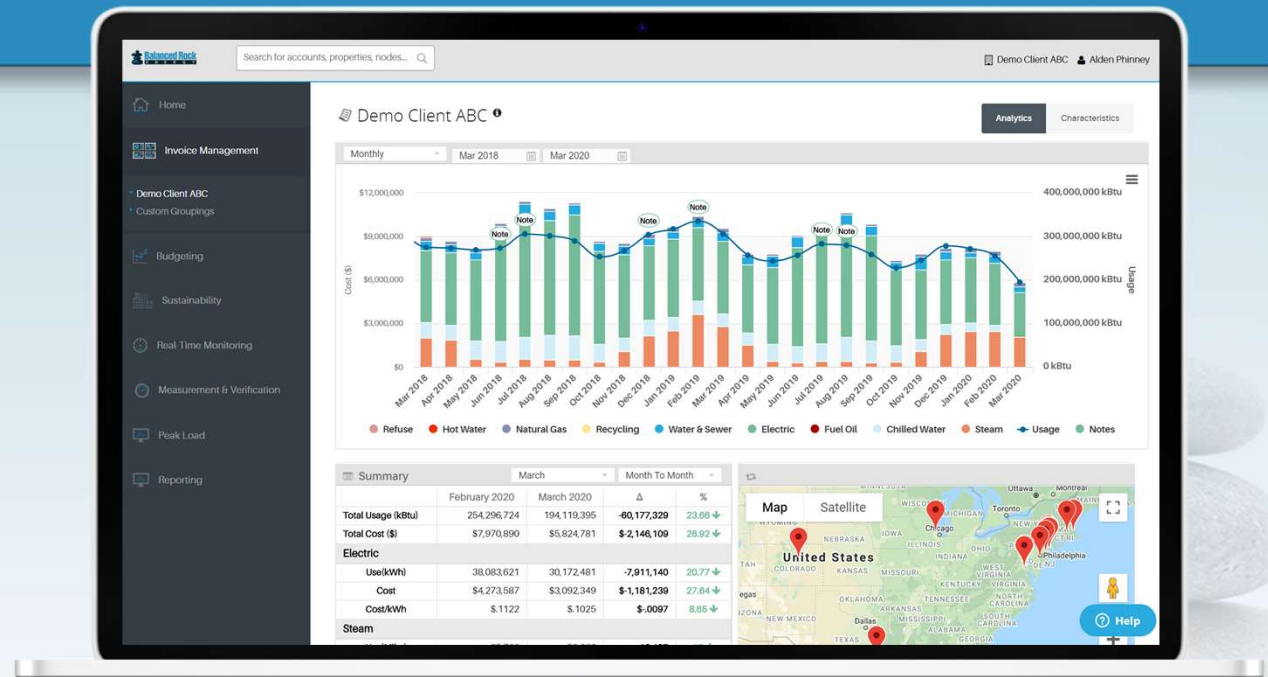
# Energy Data Analytics

- **Data Retrieval**
- **Dashboard Access**
- **Bi-Directional Interface w Energy Star**
- **Energy to Care**



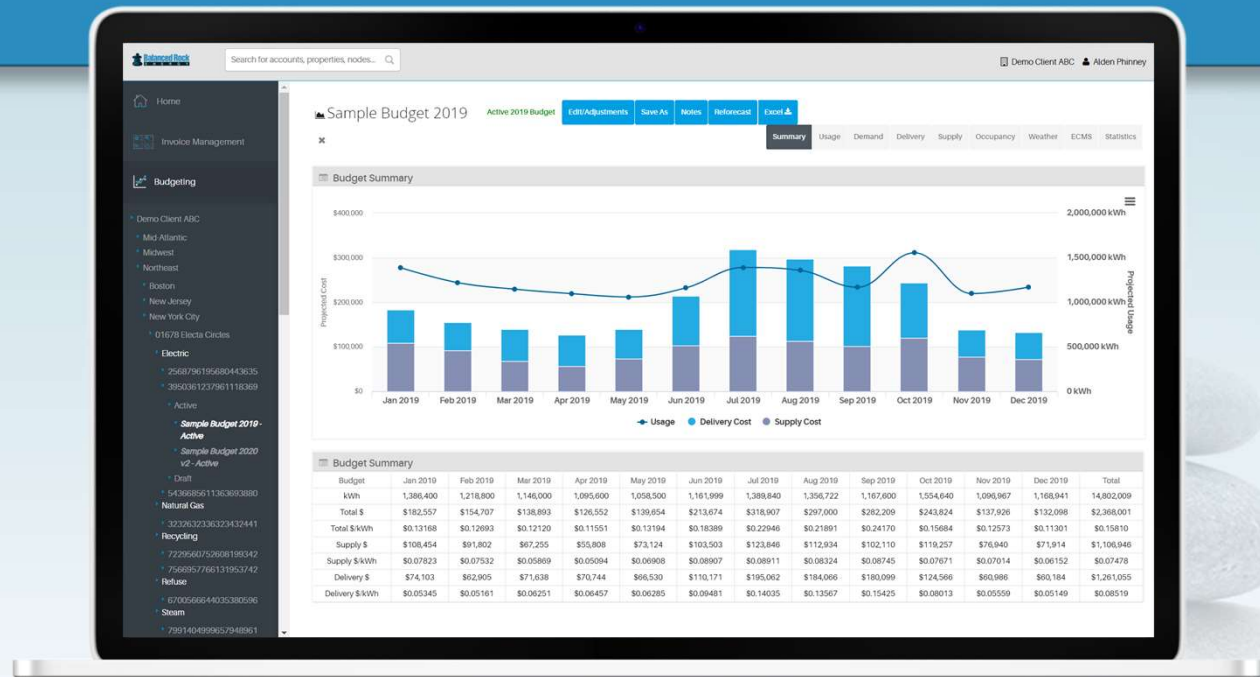
# Our Energy Analytics Solution

- **Utility/Energy Data Acquisition**
  - **Fully Automated Acquisition from:**  
Direct Data Capture via Utility RPA  
Interval Meter Capture / BMS
- **Energy & Sustainability Dashboards**
- **Invoice Management / Audits**
- **Budgeting & Forecasting**
- **Measurement & Verification**
- **Peak Load Management**
- **Sustainability Management**
  - ENERGY STAR, LEED Arc, GRESB, Energy to Care.
- **Energy Reporting**



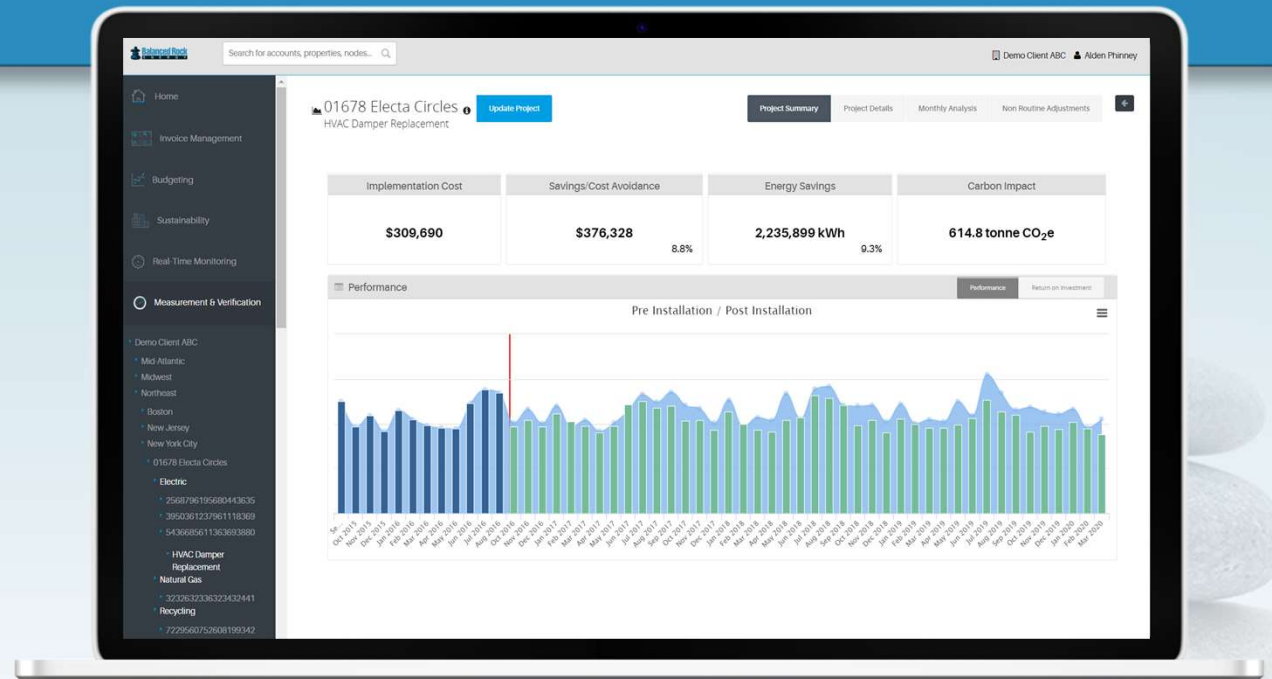
# Utility Budgeting - Prepare

- Budget based on actual consumption
- Delivery tariff rates
- Understand impact of business activity, occupancy, weather, and efficiency projects
- Allocate capital efficiently



# Measurement & Verification

- Track Multiple ECMs
- Normalize for weather, billing period length, occupancy, and more
- Verify performance and track ROI



# Real-Time Monitoring & Analytics

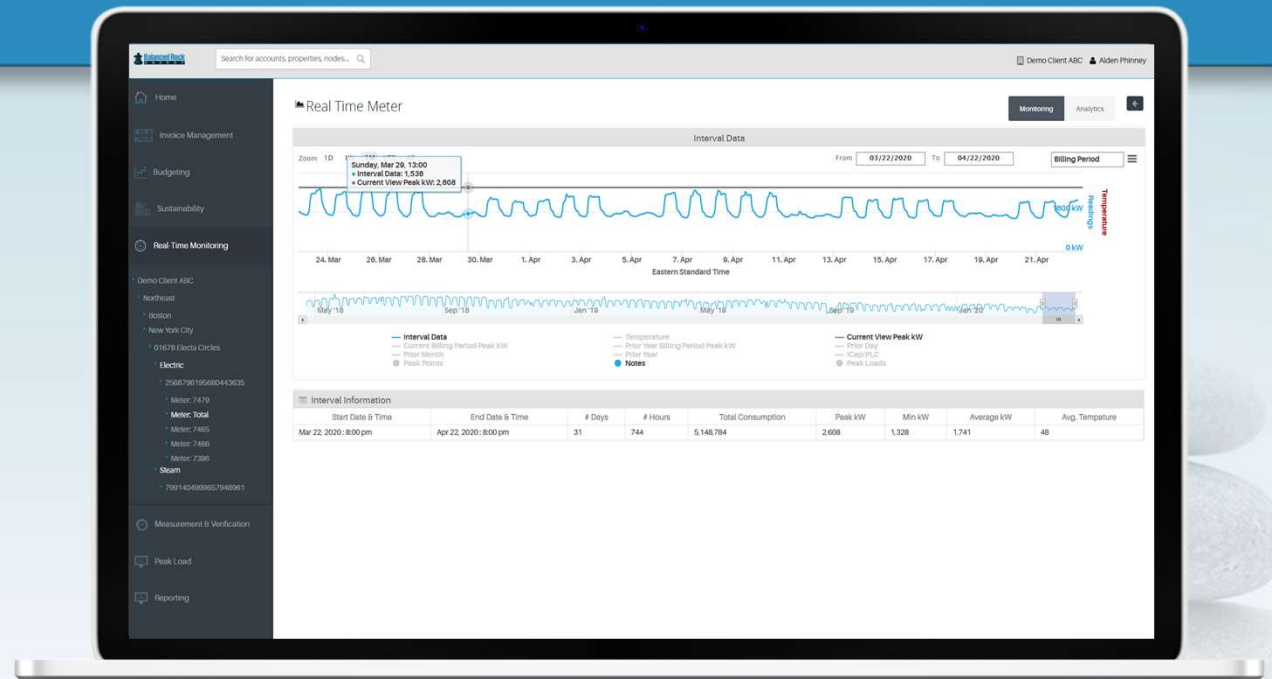
- **Hardware/metering system agnostic: utility meters, sub-meters, BAS systems, etc.**
- **5 second to 60 minute interval updates**
- **Consumption and peak alerts via email and text message**
- **User defined threshold alerts and system generated based on prior peaks**
- **View RT against prior day/prior month/prior year/current view peak kW**





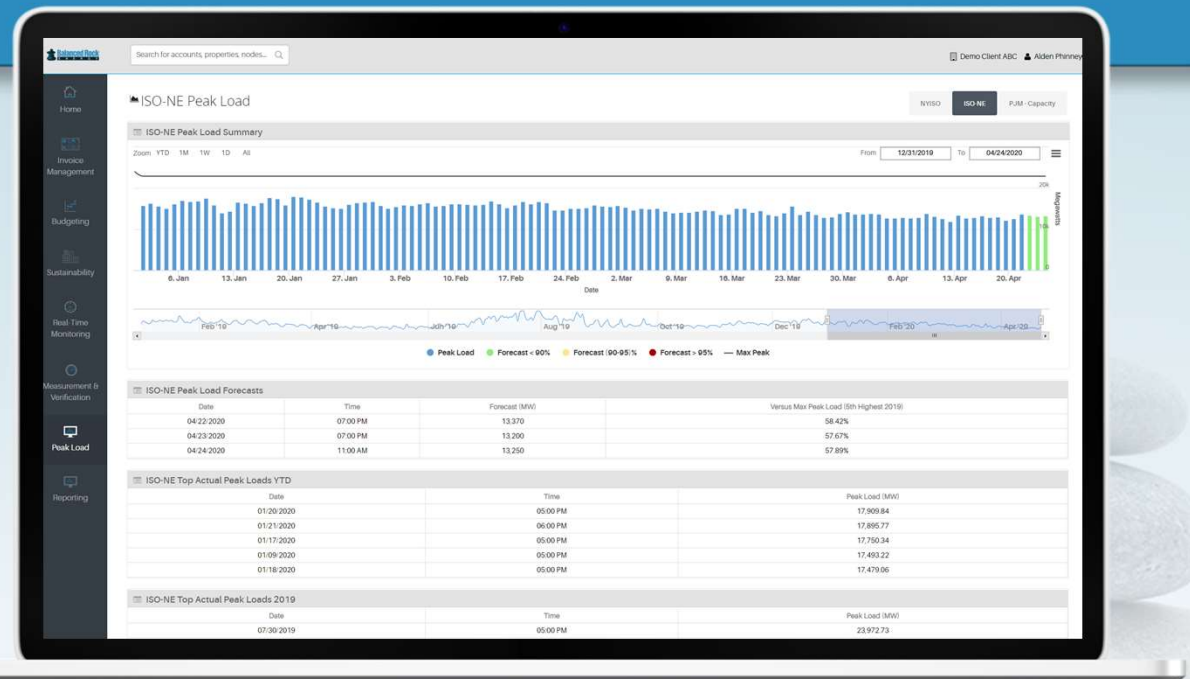
# Threshold & User Defined Alerts

- **Receive alerts when demand is within a defined % threshold vs. current billing period peak, prior peak, same month prior year, user defined #**
- **Create notes on chart to identify operational activities**



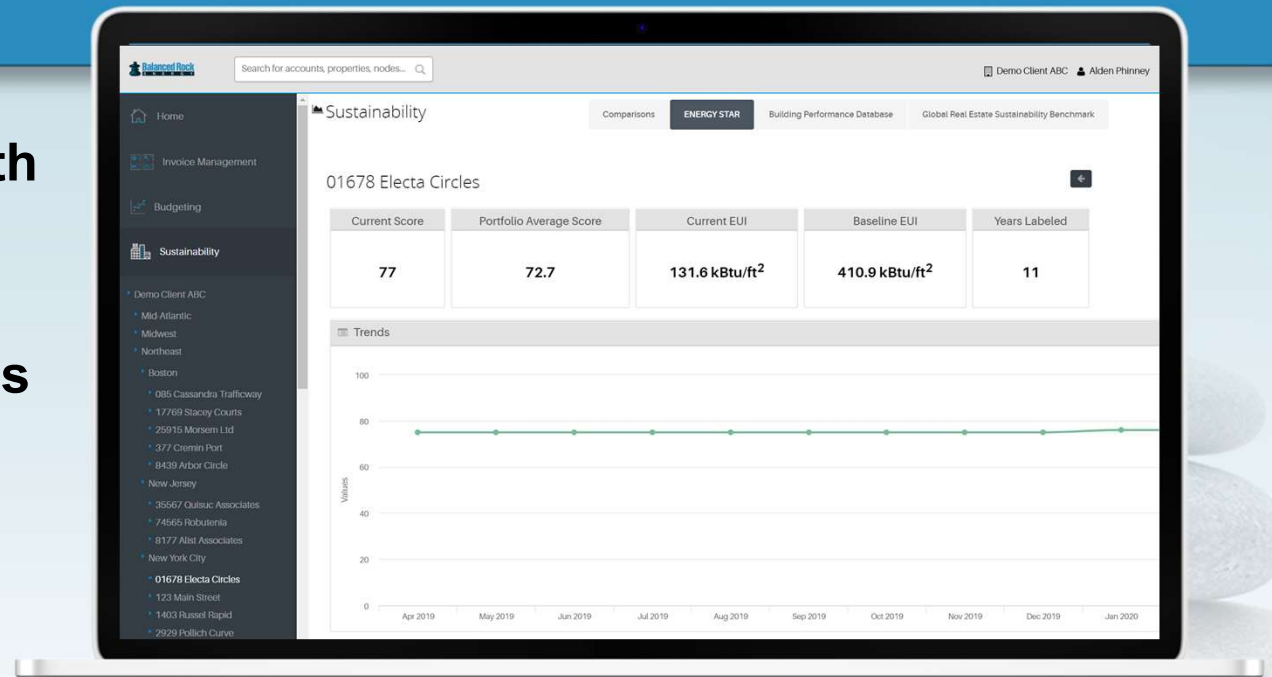
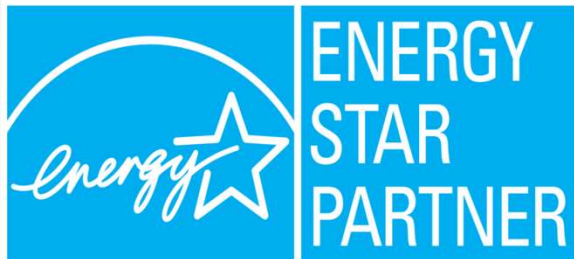
# ICAP Peak Load Hour Notifications

- Receive email/text message notifications when the grid is expected to peak
- Track when actual peak loads occurred
- Reduce capacity and peak demand charges by tens of thousands of dollars per month



# ENERGY STAR Portfolio Manager Integration

- **Direct API integration with Portfolio Manager**
- **No need to manually update or upload csv files**
- **Additional Sustainability Reporting APIs available (LEED Arc, GRESB, Energy to Care.)**



# Additional Services

- **Energy Efficiency**
- **Demand Response**
- **On-Site Power Generation**



# Energy Efficiency

THE CHEAPEST KWH IS THE ONE YOU DON'T USE

**WE CAN** \_\_\_\_\_

- Recoup in the form of rebates
- Uncover opportunities
- Maximize rebates and incentives
- Secure financing for qualified buyers



# Demand Response

A PROGRAM THAT  
PAYS YOU TO REDUCE USAGE AT PEAK TIMES ANNUALLY

## WE CAN

- Evaluate if demand response is appropriate
- Source & monitor agreement with the CSP





# On-Site Power Generation

**NATURAL GAS**

**EFFECTIVE, EFFICIENT & RELIABLE**

## **BENEFITS**

- Increased efficiency
- More reliable power
- Cleaner mix of fuel
- Many federal & state incentives
- Long term power purchase agreement available



# On-Site Power Generation

## SOLAR

CAN BE IMPLEMENTED ON-SITE / OFF-SITE  
VIA A COMMUNITY SOLAR AGREEMENT

## BENEFITS

- Low rate of power for 10-20 years
- Generate power on-site at the peak time daily without emissions



# Value



- 1 EXPERIENCE**
- 2 PROCESS**
- 3 TECHNOLOGY**
- 4 SUPPLIERS**
- 5 APPROACH**



# Value



## 1 EXPERIENCE

## 2 PROCESS

## 3 TECHNOLOGY

## 4 SUPPLIERS

## 5 APPROACH

Over 30 years of experience assisting many of the largest energy users in the world.

Hundreds of clients, thousands of agreements for billions of kWh's in every deregulated market in the US.

# Value

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1 EXPERIENCE

 2 PROCESS

3 TECHNOLOGY

4 SUPPLIERS

5 APPROACH

A structured process which includes customized bid conditions, products and terms based on your specific goals we discussed during due diligence.

# Value

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1 EXPERIENCE

2 PROCESS

 3 TECHNOLOGY

4 SUPPLIERS

5 APPROACH

We utilize a live auction-based approach. This process will create a hyper competitive bidding environment, will compress supplier margins to the bare minimum and result in the best pricing available.

# Value

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- 1 EXPERIENCE
- 2 PROCESS
- 3 TECHNOLOGY
-  4 SUPPLIERS
- 5 APPROACH

We work with every relevant supplier in every market throughout the US.

We have point people assigned to BRE at a corporate level, this reduces excess sales support and improves efficiencies.



# Value

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- 1 EXPERIENCE
- 2 PROCESS
- 3 TECHNOLOGY
- 4 SUPPLIERS
-  5 APPROACH

We use a performance-based business model. In the unlikely event you are not completely satisfied you can say “thanks, but no thanks” and walk away.

## WE LEVERAGE OUR OWN ASSETS

- Over a Decade of Experience
- Extensive Market Intelligence Data
- Technology Based Tools
- A Network of the Best Vendors
- Performance Based Approach

TO HELP YOU MAKE  
THE BEST DECISIONS!

**DAN JOYCE**  
President



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