# **BALANCED ROCK ENERGY**

### **BETTER DECISION MAKING & LESS ENERGY SPENDING**

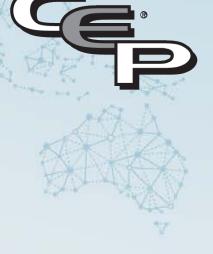




### CERTIFIED ENERGY PROCUREMENT PROFESSIONAL

### **LED BY DAN JOYCE**

12 + years of experience
hundreds of clients
thousands of contracts
billions of kWh's of power







PROVIDENCE

COLLEGE





for some of the largest energy users









**TORAY** Innovation by Chemistry



# Guiding Principles

## TRANSPARENCY INTEGRITY HONESTY

## LIQUIDITY INTELLIGENCE UNBIASED RECOMMENDATIONS



# Guiding Principles Core Competencies

EXPERIENCE TECHNOLOGY BASED APPROACH RELEVANT SUPPLIERS PROACTIVE PROCUREMENT SUPPORT PERFORMANCE BASED MODEL



# Guiding Principles

### ENERGY PROCUREMENT

### MARKET INTELLIGENCE

### RISK MANAGEMENT



# THE ENERGY MARKETPLACE CAN BE CONPLICATED Renewable in orting Report Distributed Capacity

Soo" Batter WinteManagement Supplier Batter WinteManagement Agreeme Horage Reliability Volverket

## **WE CAN HELP**

# $\mathbf{E} = \mathbf{P} \mathbf{X} \mathbf{Q} - \mathbf{i}$

- competitive sourcing of supplier agreements
- reduce usage via efficiency contracting
- maximize incentive programs for emerging technologies
- on-site generation of power & leverage of existing energy assets



### **Step 1 DISCOVERY**

**Step 2 DISCUSS & DEVELOP BUYING STRATEGY Step 3 INTERNAL EVALUATION Step 4 DEVELOP REQUEST FOR PRICING Step 5 RUN LIVE AUCTION Step 6 SET UP TRIGGERS** 



## Step 1 DISCOVERY

Collect copies of utility & supply invoices Collect copies of supply agreements Sign Utility Authorizations Balanced Rock Energy agreement Review on-site generation capabilities





# DISCUSS & DEVELOP BUYING STRATEGY

**Tolerance for Risk** 

**Budget Certainty** 

Exposure

**Types of Products** 

a. Fixed Pricing 100% Bandwidth
b. Fixed Pricing 25% Bandwidth
c. Fixed w/ Block Purchase
d. Market Based Pricing



### **Step 3 INTERNAL EVALUATION** OF FINDINGS & RECOMMENDATION

#### **Market Conditions (MIP)**

#### **Existing Agreements**

**Estimates of New Pricing Results** 

#### **Present Findings**

**Recommendation of next steps** 



## **Step 4** DEVELOP REQUEST FOR PRICING

#### **RFP** Architecting

**Confirm all Customer Information** 

**Prepare Pricing Estimates** 

**Schedule Pricing & Evaluate Results** 

**Review Agreements from Top Suppliers** 

**Schedule Executable Round & Live Auction** 





## **Step 5** RUN LIVE AUCTION

## Executable Round of Pricing Auctions run 11:30 – 12:30 Evaluate Results / Make Decisions Execute Agreements as Applicable



# **SET UP TRIGGERS**

Triggers track the market over the life of the agreement

Help with proactive procurement

Help to take advantage of buying opportunities

Set up Billing & Payment Methods



### 1 EXPERIENCE

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

Over a decade 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.



- **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.



### **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.



- **1 EXPERIENCE**
- 2 PROCESS
- **3 TECHNOLOGY**

4 SUPPLIERS5 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.



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

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.



## **REDUCE SPEND / MAXIMIZE INCENTIVES**

- Energy Efficiency
- Demand Response
- Capacity Tag Management
- Onsite Power Generation (Gas / Solar)
- Community or Shared Solar Future



**Energy Efficiency** THE CHEAPEST KWH IS THE ONE YOU DON'T USE.

### **You Can**

> Uncover Opportunities via No Cost Utility Audits

- Recover Costs via Utility Incentives & Rebates
- Secure Financing via C-PACE Energize CT



#### **Additional Options**

# **Demand Response**

GET PAID TO REDUCE ELECTRIC USAGE AT PEAK TIMES

**ASSIST NEW ENGLAND ISO WITH GRID STABILITY** 

# Vou Can

- Generate Revenue that can be re-invested in building efficiency
- Implement Traditional Curtailment via Building Controls
- Utilize Standby Generators if Tier 4 EPA



#### **Additional Options**

## **Capacity Tag Management**

SIMILAR TO DEMAND RESPONSE REDUCE USAGE WHEN NEW ENGLAND ISO PEAKS \*TYPICALLY JUNE-AUGUST

**You Can** 

- Reduce Supply Charge via Lower Cap Tags
- Implement Traditional Curtailment
- Utilize Standby Generators if Tier 4 EPA



#### **Additional Services**

# **On-Site Power Generation**

NATURAL GAS EFFECTIVE, EFFICIENT & RELIABLE

### BENEFITS

increased efficiency > more reliable power

- cleaner mix of fuel >> many federal & state incentives
- Iong term power purchase agreement available



#### **Additional Services**

# On-Site Power Generation

SOLAR

CAN BE IMPLEMENTED ON-SITE – LAND / ROOFTOPS AND CARPORTS

### BENEFITS

- Low / Stable Electric Rate for 10-20 years
- Generate Power On-Site at the peak time daily without emissions



#### **Additional Services**

# Community Solar – Future

AKA - SHARED SOLAR ALLOWS RATE PAYERS TO PURCHASE SOLAR ENERGY AT A DISCOUNT FROM OFFSITE LOCATIONS A PILOT PROJECT IN PROCESS IN BLOOMFIELD CT

### **BENEFITS**

Reduce Spend via Utility Credits / Reinvest the Difference

Assist with Financing Large Scale Solar



### 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!



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# THANK YOU

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