

A world map in the background, rendered in a light blue color. Overlaid on the map is a complex network of dark blue lines and dots, resembling a global communication or energy grid. The lines connect various points across the continents, creating a dense web of connections.

# BALANCED ROCK ENERGY

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**BETTER DECISION MAKING & LESS ENERGY SPENDING**

# Overview

## CERTIFIED ENERGY PROCUREMENT PROFESSIONAL



### LED BY DAN JOYCE

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



# Overview



PROVIDENCE  
COLLEGE



BROWN



**BENTLEY**  
UNIVERSITY



**MassMutual**  
FINANCIAL GROUP®



**APPLIED  
MATERIALS®**

**'TORAY'**

Innovation by Chemistry



**REDUCE SPEND &  
MANAGE COSTS**

**for some of the largest  
energy users**

# Guiding Principles

## Core Values

**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

# Core Services

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**ENERGY  
PROCUREMENT**

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**MARKET  
INTELLIGENCE**

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**RISK  
MANAGEMENT**

THE ENERGY MARKETPLACE CAN BE

# COMPLICATED



# WE CAN HELP

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

- ▶ 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



# Reduce Energy Spend

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**

Reduce Energy Spend

# 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**





Reduce Energy Spend

# Step 2

## 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



Reduce Energy Spend

# Step 3

## INTERNAL EVALUATION OF FINDINGS & RECOMMENDATION

**Market Conditions (MIP)**

**Existing Agreements**

**Estimates of New Pricing Results**

**Present Findings**

**Recommendation of next steps**





Reduce Energy Spend

# 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**



Reduce Energy Spend

# Step 5

## RUN LIVE AUCTION

**Executable Round of Pricing**

**Auctions run 11:30 – 12:30**

**Evaluate Results / Make Decisions**

**Execute Agreements as Applicable**





Reduce Energy Spend

# Step 6

## 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**



# Value



## 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.



# Value

**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

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

- 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

- 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.



# 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**





# ● Demand Response

**GET PAID TO REDUCE ELECTRIC USAGE AT PEAK TIMES**

**ASSIST NEW ENGLAND ISO WITH GRID STABILITY**

## **You Can**

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



# ● 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**



# ● 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 – LAND / ROOFTOPS  
AND CARPORTS**

## **BENEFITS**

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



# • 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!

**DAN JOYCE**  
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# THANK YOU

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