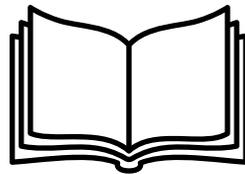


Developing and Implementing Your Clean Energy Procurement Strategy



Workbook

To develop and implement a clean energy procurement strategy, you must first assess what you are procuring for — that is, how many RECs your company will need to contract for each year to meet your goals.

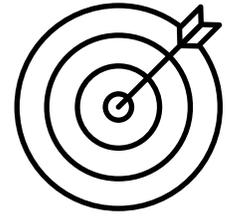
This workbook will help you consider:

- What does your organization’s energy profile look like?
- How much energy does the company use at each facility annually?
- Might energy demand increase in the future if the organization electrifies processes like space heating and industrial work, or if company-owned vehicles shift from gas powered to electric?
- What clean energy procurement options are available at each facility?



Understand Current and Expected Energy Consumption

Work with your energy procurement teams or facilities managers to fill out a **Clean Energy Site Analysis** (see end of workbook) for your facility locations. It will help you understand:



- Your company’s electricity use and providers by location
- The total amount of electricity consumed across your company’s facilities
- The timing of that electricity consumption: *Does it follow daily or seasonal patterns? How volatile is it?*
- *Are any major changes planned in the next five-plus years? Will major energy efficiency projects potentially reduce your energy demand? Will electrification of new processes potentially increase it? Does your company plan to expand and acquire new facilities that may change your electricity needs?*

Where does your organization have a substantial energy load?

Start with the five largest energy load locations and go further as your capacity allows.

Consider: What about spaces your company leases?

If you lease physical space, you may need to engage your landlord(s) for assistance in determining your energy load or procuring clean energy for your operations. Similarly, you may consider engaging your data center provider(s) to help reduce data center-related emissions. Determine who on your team manages these contracts and begin a conversation.

Landlord or Data Center Provider	Internal Contract Manager	Date for Next Contract Negotiation	Clean Energy Assistance Requested? Available?

NOTES:

Understand Your Procurement Needs

Key to understanding your procurement needs is aligning on an organizational goal. *Are you seeking to cover 100% of your load or something a bit smaller?* Many GHG or clean energy targets are framed as percent reductions compared to a baseline year.

Have you considered engaging with any goal-setting and reporting entities, such as CDP, RE100, the Science Based Targets initiative, or Change Climate? If so, are there any requirements you should keep in mind regarding participation?

NOTES:

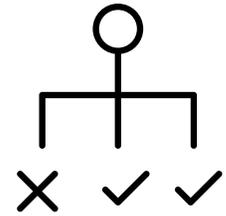
Assess your current and projected energy loads from the **Clean Energy Site Analyses** to determine your likely REC needs. Remember that every MWh of load that you intend to cover with clean energy will require one REC.

	Current uncovered annual load (orange box for each site)	Projected future annual load, if different
Site 1	MWh	MWh
Site 2	MWh	MWh
Site 3	MWh	MWh
Site 4	MWh	MWh
Site 5	MWh	MWh
Total (sites 1-5)	MWh	MWh
<i>Estimated percentage of total load represented by sites 1-5</i>		
Goal: Percentage of load to be covered by clean energy		
RECs required: (total load times goal percentage)		

NOTES:

Understand Your Procurement Options

Consider which procurement mechanisms are likely to be attractive to your company. Use this grid to note which options are suitable for each site.



Choose: Yes, No or Maybe

	Site 1	Site 2	Site 3	Site 4	Site 5
UNBUNDLED RECs					
ON-SITE CLEAN ENERGY					
GREEN TARIFFS					
RETAIL CHOICE					
OFF-SITE PHYSICAL OR VIRTUAL POWER PURCHASE AGREEMENTS					
COMMUNITY SOLAR					

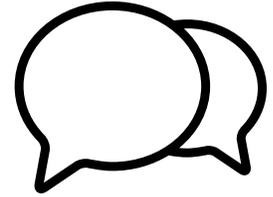
Procurement Options Reference Guide

	Pros	Cons
UNBUNDLED RECs	Easy to procure and explain; available to any energy customer	Not considered “additional”; pricing can be volatile
ON-SITE CLEAN ENERGY	Highly visible to stakeholders; available in most markets; may provide long-term electricity price certainty and savings	Project size and viability limited by available space and facility ownership
GREEN TARIFFS	Wraps RECs and energy onto a single bill; internal teams are typically comfortable engaging with utilities	Not available in all markets; not all tariffs are attractive to all customers
RETAIL CHOICE	Wraps RECs and energy onto a single bill; internal teams are typically comfortable engaging with retail choice providers	Not available in all markets; may require changing your energy provider
OFF-SITE PHYSICAL OR VIRTUAL POWER PURCHASE AGREEMENTS	Can offer a cost-effective way to procure RECs at scale; considered “additional”	Non-investment-grade customers or those pursuing small numbers of RECs will likely have difficulty accessing this mechanism
COMMUNITY SOLAR	Energy generation is local to load; can have positive benefits for the community	Not available in all markets; RECs may not be available

Engage Support and Build a Strategy

The clean energy space is complex. Your options for procurement vary based on your location, your energy load profile, and your company's credit status.

By now you are well versed in clean energy procurement basics. Consider engaging a buyer's advisor to assist you in identifying specific procurement opportunities that meet your company's goals and unique situation.



Think through what services your company is likely to need from an advisor. Check all boxes where you think you or your team may need help.

Buyer's Advisor Services

- Establishing a business case for clean energy procurement
- Socializing the business case with internal stakeholders
- Assessing your energy load
- Creating a comprehensive procurement strategy
- Deciding what type of transaction is right for your organization
- Identifying potential projects and transaction opportunities

How does your organization procure consultant services? Are there restrictions on the types of fee structures your company will allow?

Transaction fees are paid upon successful transaction.

Allowable? Yes _____ No _____ Unknown _____

Finder's fees may be paid to brokers/consultants by either the developer or the energy customer as a commission for discovery of a deal.

Allowable? Yes _____ No _____ Unknown _____

Consulting fees are an alternative, flexible model where work undertaken is paid on a pre-negotiated, arising basis or at strategic deal milestones.

Allowable? Yes _____ No _____ Unknown _____

NOTES:

Clean Energy Site Analysis | Site # _____

Facility name	State
Access to energy data: Does your company own the facility or have a triple net lease that gives control of energy spend? If not, can your landlord provide you with energy usage information?	<input type="checkbox"/> Company owned <input type="checkbox"/> Triple net lease <input type="checkbox"/> Landlord provided <input type="checkbox"/> Energy use data unavailable
Primary energy contacts: Who internally should you contact regarding clean energy procurement for this facility?	

Utility serving the site	
Does this utility offer a green tariff?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure If Yes, tariff name: _____
Does this facility have access to retail choice ? If so, do you contract with a retail choice provider? Who?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure If Yes, provider name: _____

See the [CEBI Clean Energy Procurement Map](#) for more information or contact your utility.

Total estimated annual electricity load	MWh
Is any of this facility's load already covered by clean energy (via on-site clean energy, green tariffs, etc.)? If so, what is the mechanism and size of this portion?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure If Yes, mechanism: _____ <div style="text-align: right;">MWh</div>
Calculation: Estimated load minus load already covered by clean energy	MWh
Are there any significant variations in energy load consumption (e.g., daily or seasonal fluctuation)?	
Are there any plans to dramatically adjust operations at this facility (e.g., major efficiency retrofits, new equipment installation)? If so, what are the projected energy implications?	

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