



# GUIDE TO PARTICIPATION

## CONGRATULATIONS ON BECOMING A PEER PARTICIPANT!

Committing to PEER Participation is committing to a continuous improvement, assessment, and verification for the overall sustainable performance of your electricity delivery system design and operations.

PEER Participation involves six steps:

1. Get started by [registering your project with us](#). You will then receive access to the PEER Participation package.
2. Complete the Screening Tool to determine your project's certification readiness and identify areas where improvement may be needed.
3. Use the Improvement Toolkit to identify opportunities and further refine strategies to improve your project performance.
4. Submit your projects' PEER prerequisites for pre-review by a GBCI PEER reviewer.
5. Apply for PEER certification by submitting a finalized certification application for review.
6. Receive the certification decision. If you've earned PEER certification: congratulations!

If you need assistance at any time, please [call or email us](#). [Visit our website](#) for a quick overview of PEER.

## GETTING STARTED

The first step involves registering for PEER Participation – please contact us to get started. PEER Participation is available for Campus, City, and Supply projects.

**PEER Participant Registration:** We will start by gathering a few basic details, such as the project type, then help you select a PEER Participation term based on your project timeline. After completing registration, signing the PEER Participation Agreement, and paying the [PEER Participation fee](#), the project team will gain access to the PEER Participation package, which includes the **Screening Tool**, the **PEER Improvement Toolkit**, the official **Application Workbooks**, and access to a dedicated **PEER Coach**. Certification and recertification are included in the PEER Participation fee. The PEER Participation package and all certification services are only available while the PEER Participation term is active. Not sure how long of the length of the PEER Participation term you'll need? You can extend your PEER Participation term at any time.

## PEER PARTICIPATION PACKAGE

The PEER Participation package includes a variety of tools and educational materials available during the PEER Participation term:

### Screening Tool

The Screening Tool provides a self-assessment framework for evaluating a project based on the PEER criteria. It helps users benchmark environmental and reliability performance, estimate the value produced over a customer-defined baseline, and identify performance gaps and improvement pathways. The Screening Tool is designed for use by persons familiar with project design, performance, and processes to assess whether a specific project is ready for PEER certification. There is a specialized Screening Tool for each PEER project type: City, Campus, and Supply.

## PEER Improvement Toolkit

This comprehensive toolkit is comprised of a set of improvement tools, and improvement guides intended for projects using PEER as a framework for project development, design, and continuous improvement. The PEER Improvement Toolkit contains:

- ▶ **Improvement Plan Framework:** Guide describing the improvement planning process and how to leverage the PEER sustainable design framework and performance criteria to create a long-term sustainable energy master plan. The guide includes consolidation templates for users to track their insights from other PEER tools.
- ▶ **Microgrid 8760 Analysis Tool:** Workbook for exploring how advanced 8760 hourly energy and energy cost analysis can be used to identify opportunities for improvement and strengthen the business case for investment in resiliency, demand response, load response, islanding, and other key PEER performance criteria. This learning tool allows users to generate load curves and simple payback estimates for user-proposed upgrades.
- ▶ **Energy Efficiency and Environment Guide:** Guide describing how to develop and test strategies for improving energy efficiency and environmental performance such as modifying the electricity source mix and adding efficient, clean local generation. This guide also outlines how to perform sensitivity analysis to compare multiple electricity supply options in terms of environmental performance outcomes, benefits, and the PEER overall rating.
- ▶ **Power Quality Measurement and Improvement Guide:** Guide describing key electricity power quality performance metrics, and when, where, and how to measure them. This guide also discusses methods for improving power quality and provides a power quality improvement plan framework that include needs assessment, monitoring, and mitigation.
- ▶ **Failure Modes and Effects Analysis (FMEA) Builder:** A compilation of industry-supplied failure mode and effects analyses (FMEAs) organized by subsystem. This tool includes examples of typical critical components and systems, component-specific failure modes, effects, and solutions applied by other projects. This compilation can be used to inform brainstorming sessions to identify and rank vulnerabilities and risk mitigation strategies.
- ▶ **Failure Identification and Elimination Guide:** Guide outlining how to develop an equipment failure identification and elimination process that includes trending, causal analysis, corrective action, and effectiveness review.
- ▶ **Reliability Simulator:** Workbook for identifying and testing strategies to improve reliability performance by assessing the impact of undergrounding, islanding, alternative sources of supply, distribution redundancy, and automated restoration on project circuits. This tool can be used to perform sensitivity analysis to compare multiple strategies in terms of their impact on reliability.

- ▶ **ICE Calculator Guide:** Guide describing how to use the Lawrence Berkeley National Laboratory Interruption Cost Estimate (LBNL ICE) calculator to estimate customer savings associated with predicted reliability improvements.
- ▶ **Dynamic Rate Guide:** Guide describing how to develop and evaluate proposed rates designed to encourage customer investment in price-responsive technology solutions and grid services.

## CERTIFICATION & RECERTIFICATION

The next step is to get your project ready to submit an application for PEER certification. PEER certification is the process where GBCI reviews the completed Application Workbooks and documentation submitted by you to determine if the project complies with the requirements of the PEER Rating System and earns the minimum number of points necessary to achieve PEER certification.

### PEER Coach

Before you begin your PEER certification application, you may have a few questions. PEER Participation gives project team's direct access to a dedicated PEER Coach who will be your point of contact within GBCI. While your project's consultant is the primary source for providing technical support about the PEER Rating System to your team, the PEER Coach can provide answers to technical questions about the PEER rating system and help clarify PEER requirements in instances when you are unable to find an answer in published guidance, and/or when your project has a unique or complex scenario. The PEER Coach will also be able to direct your team to available resources and guidance that can be used while you prepare your application. You will have the option to request a one-hour call each month during your PEER Participation term with your PEER Coach to discuss your prepared questions for real time feedback.

Remember, the PEER Coach is not a member of the project team. While your PEER Coach can provide answers to questions, they cannot complete the PEER Improvement Toolkit or Application Workbooks on your behalf. Further, your PEER Coach is not permitted to provide recommendations on design or operational strategies that can be implemented on your project to meet PEER requirements. These are the types of functions that may be fulfilled by a consultant or other project team members.

### Application Workbooks

The PEER Application Workbooks outline the detailed project documentation requirements and contain the calculations that must be provided to GBCI in order to apply for PEER certification. There is one workbook for each PEER category, as follows:

- Reliability and Resiliency
- Energy Efficiency and Environment
- Operational Effectiveness
- Customer Contribution

The PEER rating system includes comparisons to industry benchmarks for reliability and environmental performance and these reference data sets are imbedded in the Application Workbooks. If a project is not submitted for certification within three years of its registration date, the project team must contact GBCI and request updated reference data sets.

*Please note: Application Workbooks that are submitted for PEER certification that contain reference data sets that are older than three years will not be accepted.* Requiring the use of recent reference data help to ensure that appropriate reliability and environmental benchmark data is used to calculate the PEER rating.

At any time before submitting for certification, your team may elect to upgrade to the most current version of the reference data sets and Application Workbooks at your discretion; updating the reference data sets becomes required only if you are submitting more than three years post-registration.

### **Pre-review**

Prior to submitting a complete PEER application for certification, you have the option to submit your PEER prerequisites for pre-review by a GBCI PEER reviewer in PEER Online (note: this step is highly encouraged for your first project). GBCI will respond with its pre-review results within 20-25 business days, including technical feedback indicating which prerequisites are on the right track and which require revisions for a successful certification submission. Only initial certification applications receive a pre-review. Recertification applications are not eligible for pre-review.

### **Certification Review**

After incorporating the feedback from your pre-review and finalizing the PEER Application Workbooks, you are ready to submit your application for certification. GBCI will conduct a thorough technical review of the application. The PEER Participation fee includes a preliminary and final review of each prerequisite and credit.

#### **Part 1: Preliminary Review (included in PEER Participation fee)**

- You will first submit your application for preliminary review. GBCI will check your application for completeness and compliance with PEER rating system prerequisites and attempted credits.
- GBCI will respond with its preliminary review within 20-25 business days, indicating which prerequisites and credits are anticipated to be awarded during final review, which prerequisites and credits are pending and require additional information, or if the prerequisite or credit requirements cannot be met by the project, these will show up as denied.
- Your team can accept the preliminary review results as final if you are satisfied, submit new or revised documentation, or attempt additional credits before submitting for final review.

#### **Part 2: Final Review (optional, included in PEER Participation fee)**

- The final review phase allows you to submit supplementary information or amend the application. GBCI suggests you submit these clarifications within 25 business days after receiving the preliminary review results.

- GBCI will respond with a final PEER certification review report within 20-25 business days, marking prerequisites and attempted credits as either awarded or denied.
- Like the preliminary review, you can either accept the review results as final, or revise your application and resubmit, this time as a supplemental review for a fee

### **Part 3: Supplemental Review (optional, included in PEER Participation fee)**

- The supplemental review is a third, optional, review stage provides one additional round of review and allows you to submit supplementary information, amend the application or add new credits not previously attempted. GBCI will review the pending or newly submitted prerequisites and credits.
- GBCI will respond with an updated PEER Certification Review Report within 20-25 business days, marking prerequisites and attempted credits as either awarded or denied. At this time, you will accept your PEER Certification Report.

### **Part 4: PEER Certified**

Accepting your PEER certification report is the final step in the PEER review process. If you've achieved certification: congratulations from all of us at GBCI!

Once you've accepted your certification, your project will be deemed "closed out"; you will no longer have the option to clarify any of the credit or prerequisites, nor will you be able to submit new credits for review, so please double (triple) check that you have achieved all the prerequisites and your targeted credits before accepting the certification.

Project teams are required to report PEER key metric data to GBCI annually on the anniversary date of the award letter granting certification by using the approved and easy-to-use template.

### **Recertification (required every three years, included in PEER Participation fee)**

PEER is a performance monitoring and continuous improvement process intended to provide benefits and increased performance throughout the life of the project. Projects must recertify every three years from the date in which PEER certification was awarded in order to maintain an active PEER certification. Opting-in to recertification extends the projects original certification period for six months. This means that you'll have an extra six months to retain your "active" PEER certification status while you prepare your recertification application. Failure to opt into recertification within the three-year timeframe or failure to submit your recertification application for preliminary review within the six month grace period will cause your PEER certification status to expire. Projects may elect to recertify more often than the required three-year timeframe. The PEER Application Workbooks submitted as part of the recertification application may be no older than three years at the time of submission.

If your project is pursuing its first recertification, it may elect to submit the application using either the version of the PEER rating system for which it achieved initial certification or you may elect to use the most recent version. For all subsequent recertification cycles, a project will be reviewed under the version of PEER that is in place 12 months prior to the expiration of its then-current certification.

Recertification applications are reviewed in the same review process and associated timelines as initial certification applications.

## HOW IS GBCI UTILIZING YOUR PROJECT DATA?

PEER-registered and certified projects are, by default, considered public projects, and thereby included in GBCI's public project directory. A listing in this directory allows the general public and members of the media to look up your project listing and its related details.

Here's a full list of the data and project elements that may be listed in the project directory:

- PEER project ID
- Is private? (Y/N)
- State
- Country
- PEER version
- Total points achieved (if applicable)
- Cert level (if applicable)
- Cert date (if applicable)
- Is certified? (Y/N)
- Project size (Peak MW)
- Project size (Annual MWh)
- Project type:
- Registration date

All public projects also benefit from publicity opportunities: GBCI may utilize your project data to create case studies highlighting your project's features, reference your project on our website or to the media, or create other derivative works.

Information that may be used for articles, project profiles, and other features:

Service provider name

Project team member names, organizations, and titles

Promotional or other project photographs

Project strategies for certification

Quotations from team members

However, you are free to opt-out of the project directory and publicity opportunities as a private project at the time of registration: specific instructions on how to do so are available by contacting GBCI. Private project listings in the project directory do NOT include any of the elements above. All private projects that earn certification will be contacted once more to transition to public status (we can't help ourselves, we love sharing good news!). You will need to re-confirm your private status at that time if you wish to retain it.

Projects that fail to report key metric data to GBCI annually will be listed in the directory as "lapsed". Projects that failure to recertify within the specified timeframe will be listed in the directory as "expired".

## FEES

So, how much will it cost to certify your project and keep it certified? PEER Participation provides an exceptional value for your money. [View the current fee table](#), with explanations below.

### **When do I pay the PEER Participation fee?**

You will be invoiced for the PEER Participation fee by GBCI.

### **How are PEER Participation fees calculated?**

PEER Participation fees for city and supply projects are calculated by the length of PEER Participation term you select. PEER Participation fees for campus projects are calculated by the length of PEER Participation term you select, as well as per MW per term, with set minimums in place. Savings per year increase with the longer the term you select, but the entire fee is due up front.

### **What does the PEER Participation fee cover?**

The PEER Participation fee covers access to PEER workbooks, reference data sets, guides, tools, PEER Coach, and submitting an application for pre-review, certification review, supplemental review, or recertification for the entire length of your PEER Participation term, which must be active in order to maintain access to these services.

### **How do I know how long my PEER Participation term should be?**

Once your project is screened, you will have an idea of how close your project is to meeting the minimum scoring and prerequisites of the PEER Rating System. You would then select the PEER Participation term length that corresponds most closely with how many years it might take your project to design or improve to the PEER standard, and to submit for certification or recertification services, including the review timelines, as outlined in this guide. You will have the option during your term to extend it if you need more time. If you have any questions about the length of PEER Participation term suitable for your project, please [email](#) us.

### **How do the PEER Participation fees and PEER Participation terms work in relation to certification and recertification?**

To maintain PEER certification, ensuring your project continues to perform to the PEER standard, recertification is required three years after initial certification, and every three years thereafter. While the recertification cycle is every three years and we encourage you keep your PEER Participation term active to take advantage of the services, it is fine for your PEER Participation term to lapse after your project has been certified or recertified until the time at which the project must submit for recertification. If at that time your PEER Participation term has lapsed, and you need to submit for recertification, you will be prompted to initiate a new PEER Participation Term, signing a new PEER Participation Agreement, and adhere to the newest version of the PEER Rating System.

### **Resources:**

[PEER Credit Library and Rating System](#)

[PEER Education](#)

[Certification Challenge Policy](#)

[PEER Trademark Policy](#)