

# FlexTech and AMEEP

## How They Work Together



An energy audit must be performed to participate in the “Comprehensive Pathway” of the [Affordable Multifamily Energy Efficiency Program](#) (AMEEP).

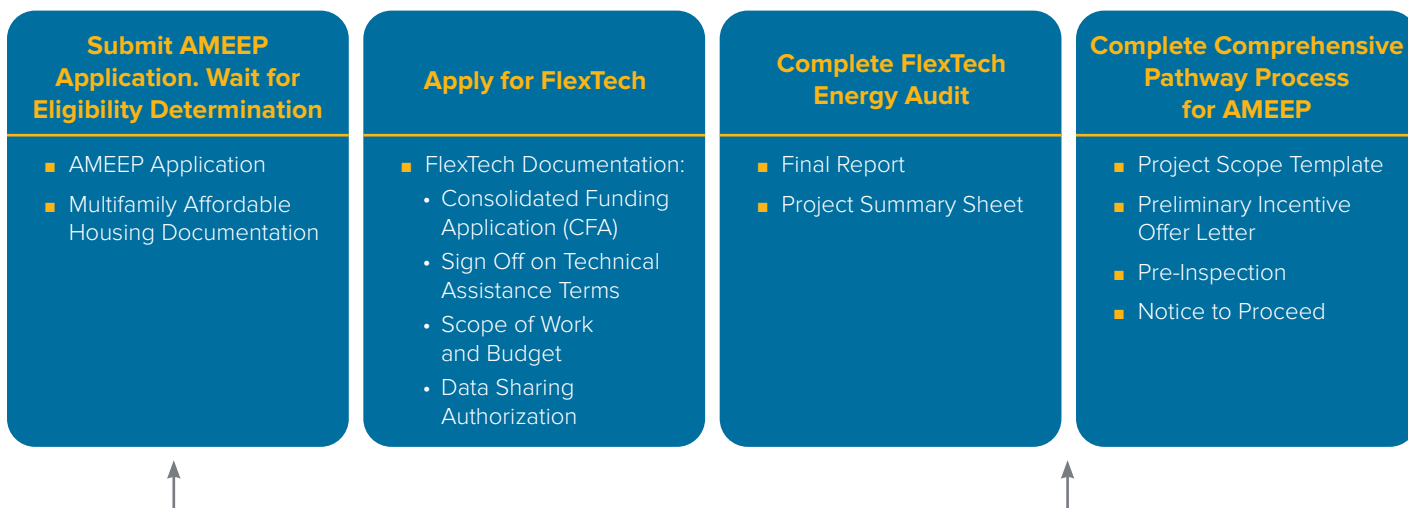
NYSERDA’s [FlexTech program](#) offers a 75% cost share. The Applicant (building owner or energy consultant) must apply and qualify for each program to take advantage of the incentives. There are two application options available to participate in both AMEEP and FlexTech. Both options are outlined in detail in this document.

## Flexible Application Timeline

Applicants can submit applications to both FlexTech and AMEEP in either of the two order options below:

- Apply to AMEEP first and then apply to FlexTech (the AMEEP Application can serve as the application to FlexTech if you choose this option). OR
- Apply to FlexTech first, complete the FlexTech audit, and then apply to AMEEP.

Details for these steps and application process are available in this chart and below in further detail:



### Submit AMEEP Application. Wait for eligibility determination.

- Submit the [AMEEP Application](#) and affordable housing documentation to the utility’s IC. The IC reviews the application package and confirms (a) if the building qualifies as affordable and (b) the project is eligible for AMEEP.
- Review the [AMEEP Program Manual](#) (p. 7-9) for information on affordable housing verification and acceptable documentation.
- The AMEEP application can be submitted as the first step or can be submitted after the completion of a FlexTech energy audit.

### Apply for FlexTech (see program timeline below).

- FlexTech energy audits must be conducted by an approved Energy Service Provider. You can choose an Energy Service Provider through either of the following two networks or an Independent Service Provider:
  - [NYSERDA Multifamily Building Solutions Network](#)
  - [NYSERDA FlexTech Consultants](#)
- If applying through AMEEP first, The IC will send the approved AMEEP application, affordable housing documentation, and Scope of Work (SOW) to NYSERDA for FlexTech approval.
- If applying to FlexTech first, the Applicant will apply directly to FlexTech and the following must be included in the application submission:
  - [FlexTech Program Application](#)
  - [Multifamily Affordability Verification](#)



NYSERDA

- For all projects, regardless of application process:
  - Submit the following program documents to NYSERDA at [flextech@nyserda.ny.gov](mailto:flextech@nyserda.ny.gov):
    - » [Attachment A-1: Program Application for AMEEP Coordinated Projects- Consolidated Funding Application \(CFA\) & Technical Assistance Terms](#)
    - » [Energy Study Scope of Work Template](#)
    - » [Attachment C: Authorization to Share Information with NYSERDA Partners Data Sharing Authorization](#)
- NYSERDA will assign a Project Manager (PM) and send an email within **3–5 days** acknowledging receipt of documents.
- NYSERDA will review documents, issue SOW comments, then schedule a scoping call within **2 weeks** of receiving the application.
- Provide responses to the comments and send a revised SOW to NYSERDA within **30 days**. Please note: It may take more than 1 round of comments to finalize the SOW.
- NYSERDA will send out an approval email once the SOW is approved.
- NYSERDA will then issue a Purchase Order (PO) within **4–6 weeks** of SOW approval. The FlexTech energy audit can begin once the PO is issued.

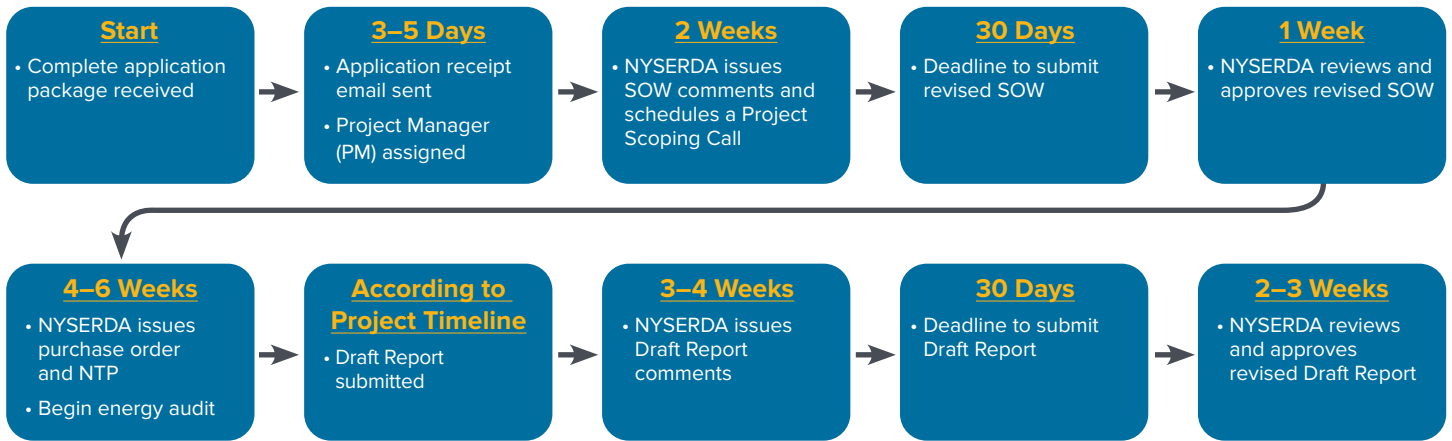
### **Complete FlexTech Energy Audit.**

- After completing the FlexTech audit, complete the two deliverables – a Draft Report per [Report Guidelines](#) and a [Project Summary Sheet](#) (PSS).
- Submit both deliverables to NYSERDA at [flextech@nyserda.ny.gov](mailto:flextech@nyserda.ny.gov) according to the agreed upon project timeline in the SOW.
- NYSERDA will perform a technical review of the deliverables and issue Draft Report comments within **3–4 weeks**.
- Provide responses to the comments and submit a revised Draft Report within **30 days**.
- It will take approximately **2–3 weeks** after the revised Draft Report is received for the final Draft Report to be approved.
- Once the Draft Report has been approved, NYSERDA will send out an approval email.
- NYSERDA will pay a 75% cost share of the total study cost directly to the applicant.
  - *A building owner, FlexTech consultant, or Independent Service Provider can be an applicant for the FlexTech program and will be paid directly by NYSERDA. Refer to the Project Payments section of the [FlexTech Program Guidelines](#) for more details on the payment process.*
- After the 75% cost share has been paid, NYSERDA will transfer the Final Report and PSS back to the utility's IC.

### **Complete Comprehensive Pathway Process for AMEEP.**

- Finalize the scope and initiate the project:
  - Fill out a Project Scope Template provided by the IC.
  - Receive Preliminary Incentive Offer Letter from the IC.
  - Design new systems, hire contractors, submit cut sheets, and savings calculations (such as energy model or TRM based savings calculations accounting for interactive effects).
- AMEEP Application Approval:
  - Perform Pre-Inspection and engineering review.
  - Receive NTP.
- Complete project:
  - Install equipment.
  - Receive mid-project payment (optional).
  - Submit completion paperwork.
  - Post inspection and final engineering review.
  - Receive incentive payment.

FlexTech Project Milestones



**Please Note:**

- SOW and Draft Reports may require more than one round of comments
- Failure to submit items within specified timeline may result in cancellation

