

## **Attachment B-1: Final Report Requirements**

**Executive Summary** - Concisely summarize the FlexTech project's intent, findings, recommendations, and economics of the recommendations in narrative format.

**Background** - Provide information about the applicant and the project, such as type of business or organization, average number of employees per location, annual energy costs by fuel type, electric and gas suppliers, and rate tariff.

**Project Description** - Include a description of the project intent, approach, and tasks performed as defined in the project scope. If any deviations from the scope of work occurred during the project, please provide an explanation for those changes.

**Project Results/Recommendations** - Describe the project findings here.

- Include reasons for recommendations on cost-effective energy efficiency measures and capital improvements.
- **Economic analysis:** Provide recommendations supported by thorough economic evaluation to include, at minimum, all parameters required for simple payback analysis. Life-cycle cost or other more detailed analyses (e.g. ROI, IRR, etc.) may also be included, if desired or if required in the scope of work. An estimate of implementation costs with the source citation or vendor quotes if applicable should be provided.
- **Additional benefits:** Final reports should strive to include information on additional potential project benefits, such as increased productivity, job creation or retention, greenhouse gas reduction, or environmental benefits. Include a qualitative description of other project benefits, such as increased knowledge or information base, comfort, competitiveness, product quality, or energy affordability.
- **For projects where computer modeling is used, reports must also include:**
  1. Brief presentation of the manipulations which the program performed (e.g. utility bill calibration and accuracy level)
  2. Input data for the building and for each EEM should be presented in a manner which allows easy identification of input parameters
  3. Output data from model with clear and precise presentation of the results in both tabular and narrative forms
  4. Verification that interaction effects were taken into account

**Appendices** - This section shall include supporting documentation for all recommendations not included in the previous section, along with:

- Historical energy costs (minimum 12 months)
- Calculations for all EEM's reviewed, assumptions
- Conversion factors
- Itemized project implementation costs (at minimum material and labor costs associated with each measure)
- Sources of cost estimates and/or vendor quotes as applicable
- Energy savings calculations must demonstrate clear assumptions based on anticipated changes to the system or equipment being evaluated

- Rule of thumb assumptions and percentage savings calculations are not acceptable
- Energy savings calculations must be presented as savings at the customer's utility meter(s), and not at the individual building or tenant space. *For example, self-generated steam or chilled water savings should be reported back to the source of generation (i.e. natural gas)*

**Project Summary Sheet** - This one-page summary outline is required for all projects (see Attachment B-2). This form provides a simple matrix of the project by summarizing the payback, costs and savings in dollars, therms, MMBtu's, and kWh and kW where appropriate.

**\*FlexTech Consultants: All FlexTech Consultant draft and final reports must be stamped by a New York State Licensed Professional Engineer or Registered Architect.**

### **Invoice Requirements**

The FlexTech Consultant's invoice(s) should be broken out by non-labor costs, individuals, titles, hourly rates, dates and hours worked on each task. Invoices should also indicate the amount that is being invoiced concurrently to the Customer. In addition, if applicable, NYSERDA may also require a copy of the customer's canceled check paying their study cost-share.