

Applications accepted through January 4, 2021 at 5:00 PM Eastern Time*

New York State Energy Research and Development Authority (NYSERDA) is accepting applications from vendors, installers and service providers of Real Time Energy Management (RTEM) to become a RTEM Qualified Vendor. NYSERDA is seeking both RTEM System Providers (installers) and RTEM Energy Management Consultant Providers (monitoring services). NYSERDA offers the following benefits to RTEM Qualified Vendors:

- **Access to RTEM funding when available (anticipated May 2016)**
- **Access to continuous market intelligence**
- **Access to Technical Guidance Documents**
 - Compiled using empirical data from projects identifying:
 - New technologies
 - Installation and maintenance strategies
 - Energy efficient savings
 - Non-energy benefits
- **Promotional materials** such as RTEM literature and advertising templates
- **Publicity** through NYSERDA's website at www.nyserda.ny.gov, case studies and other materials, as available.

Application Submission: Applicants must submit a completed RTEM Qualified Vendor Application (Attachment A). Applications must be clearly labeled and submitted to commercialprograms@nyserda.ny.gov

or

**Commercial Market Development
Real-Time Energy Management
NYS Energy Research and Development Authority
17 Columbia Circle, Albany NY 12203**

If you have questions concerning this solicitation, contact Joshua Clyburn at joshua.clyburn@nyserda.ny.gov.

Applications will be accepted on a continuous basis until January 4, 2021. If changes are made to this solicitation, notification will be posted on NYSERDA's website at www.nyserda.ny.gov.

NYSERDA reserves the right to extend and/or add funding to the Solicitation should other program funding sources become available.

Section I: Introduction

The NYSERDA Real-Time Energy Management effort promotes effective, energy-efficient solutions for commercial buildings and processes to practitioners in the energy management software and services sector. NYSERDA hopes to demonstrate the value proposition of comprehensive monitoring and metering analytics, and how it provides building owners with system level energy usage data. These valuable insights can maximize energy performance, prevent operational stray, improve equipment/building optimization, and better inform capital investment recommendations.

This solicitation is divided into the following components:

Section II: Eligibility Requirements

Section III: RTEM Qualified Vendor Requirements

Section IV: Application Process

Section V: Required Information

Section II: Eligibility Requirements

NYSERDA is seeking to pre-qualify RTEM vendors, installers, and service providers that demonstrate the ability to meet the following RTEM Eligibility Requirements. Firms interested in applying to be on the NYSERDA RTEM Qualified Vendors List may include, but are not limited to: system providers, Energy Service Companies (ESCOs), energy consultants, and engineering companies. Firms must provide proof of potential, and demonstrate they can successfully provide customers with ways to monitor energy usage, provide optimization, and deliver energy efficiency services. Potential vendors will be evaluated qualitatively and quantitatively on past RTEM projects that have been implemented within 24 months of submitting to this RFQ.

RTEM System Providers Eligibility Requirements

RTEM Systems are defined as the monitoring hardware and software used to extract, process, and store energy usage data. The capabilities below will need to be validated firsthand by NYSERDA. This will be done using multiple methods, including, but not limited to, accessing a live system, witnessing operational capabilities, and document review. System validation will need to be conducted on a live data system, in the same fashion as it is intended for the system's users.

1. Energy consumption tracking
2. Energy performance analysis
3. System integration
4. Reporting and data export
5. Data capacity
6. Interface capabilities
7. Networking capabilities

RTEM Service Providers Eligibility Requirements

RTEM Services are defined as consulting services that customers contract with to analyze energy usage data and provide, enable, and/or implement actionable items base on the data. RTEM Services does not refer to software as a service, or SaaS. If RTEM Services use SaaS as a tool to provide, enable, and/or implement actionable items, and is incorporated into the contract, SaaS can be included in the RTEM project cost share. The capabilities below will need to be validated by NYSERDA. This will be done by reviewing current and past projects, project results of existing or past projects/portfolios.

1. RTEM site profiling and benchmarking
2. RTEM analytic and forecasting capabilities
3. RTEM evaluation and implementation

Section III: RTEM Qualified Vendor Requirements

1. RTEM Qualified Vendors agree to promote the use of effective, energy-efficient products, services and designs, as defined by this RFQ, to commercial customers.
2. The Qualified Vendor further agrees to abide by the terms and conditions in this PON.
3. Becoming a Qualified Vendor is completely voluntary and NYSERDA can remove a Vendor from the list at any time for any reason. NYSERDA may revoke the status of the Qualified Vendor and remove them from the website if the Qualified Vendor does not meet all Program requirements. Vendors may also request to be removed from RTEM Qualified Vendor list.
4. The Qualified Vendor shall submit information from at least one project within one year of becoming a Qualified Vendor and one project per year thereafter to verify they deliver RTEM offerings to customers and to maintain active status.
5. If NYSERDA identifies an instance where these rules have not been followed, the Qualified Vendor is required to fully cooperate in any investigation of a possible violation. Failure to comply will result in the Qualified Vendor losing its active status.

Section IV: Application and Evaluation Process

To submit to this solicitation today:

1. Application: Email your completed RTEM Qualified Vendor Application (Attachment A) to commercialprograms@nyserdera.ny.gov.
2. Survey: After submitting the Application, you'll receive an email message with instructions to take an initial survey. The survey will gather information on the capabilities of the RTEM system and/or RTEM services you are applying to provide and the preferred method for NYSERDA to verify the capability. Verification options include supplying NYSERDA with marketing and sales literature, operating manuals, screenshots, case studies, or live demonstrations depending on the capability being reviewed.
3. Interview: After review of the completed survey, NYSERDA will schedule an interview to discuss verifying the capabilities listed in the survey. The interview may take the form of a phone call, face-to-face meeting, webinar with remote viewing of the RTEM capabilities or all of the above. The Applicant must be prepared to provide information on its RTEM capabilities. These capabilities will need to be validated firsthand by NYSERDA, including, but not limited to, accessing a live system, witnessing operational capabilities, and document review. System validation will need to be conducted on a live data system, in the same fashion as it is intended for the system's users. Any additional supporting documentation requested during the interview shall be submitted to commercialprograms@nyserdera.ny.gov.

Section V: Required Information

The following will also be reviewed at the scheduled interview:

RTEM Project Examples:

The Applicant must provide proof of capabilities through an RTEM Sample Project Report. If applicable, provide documentation of any RTEM related work performed in New York State. A minimum of two (2) RTEM projects must be submitted for review. The report shall demonstrate the quality of the Applicant's work, methodology, and results. It shall also show the various types of analyses and reports that are delivered to the customer. The associated scope of work and itemized budget must be included. The RTEM projects must have been completed within two years of application submission date. The projects must include, but not limited to, the following:

- Description of RTEM systems
- Description of RTEM services
- Description of benefits and costs
- Description of realized energy savings
- Equipment specifications
- Installation lead time
- Customer contact information

Overview of Firm:

The Applicant must provide a description of its organizational structure and the office(s) that serve RTEM systems and/or services to customers.

NYSERDA may request additional materials as reasonably necessary to facilitate review.

To submit to this solicitation in the near future (please check NYSERDA's website frequently for an update on this process):

- Visit <https://cmsapps.nyserdera.ny.gov> to apply to the RFQ on line.

Attachments:

Attachment A: RTEM Qualified Vendor Application

RTEM Qualified Vendor Application (Attachment A)

RTEM SYSTEM PROVIDER INFORMATION - RTEM Systems are defined as the monitoring hardware and software used to extract, process, and store energy usage data.	
Company	
Contact Name and Title	
Address City, State and Zip	
Phone	
E-mail Address	

RTEM SERVICE PROVIDER INFORMATION (if different from RTEM SYSTEM Provider) - RTEM Services are defined as consulting services that customers contract with to analyze energy usage data and provide, enable, and/or implement actionable items base on the data.	
Company	
Contact Name and Title	
Address City, State and Zip	
Phone	
E-mail Address	

**Please email your completed Application to Commercialprograms@nyserda.ny.gov.