

Attachment D - Glossary (Definitions of Terms)

Advanced Measurement and Verification (AMV): For the purpose of this solicitation, AMV refers to the CalTRACK data analysis methodology and software implementation to support weather-normalized metered energy consumption (NMEC) savings calculations as a basis for savings claims for the P4P Pilot.

AMV Platform: A software package designed and maintained by the AMV Solution Provider and hosted on Amazon Web Services to support NMEC saving calculations for Portfolio Manager(s)' Portfolios and to serve as the system of record for all Projects.

Basis-of-Payment: All energy savings for which a Portfolio Manager can be compensated within a performance quarter, including Initial Payments, Payable Energy Savings, and Non-Routine Adjustments.

Bid: The total U.S dollar amount that is requested for the five-year (5) contract period. Levelized Cost and Payment/Energy Unit will be calculated from this value.

Customer: An active utility account holder for Con Edison electric service, which may at times also include an active account holder for Con Edison gas service.

Customer Information: Proprietary, sensitive or confidential information of Con Edison or NYSEERDA, as the case might be, including, names, addresses, Con Edison account numbers, billing and usage information, energy consumption data, service classifications, detail regarding participation or non-participation in energy efficiency or demand management programs, and for businesses, North American Industry Classification System (NAICS) codes of the Disclosing Party or any of its affiliated entities, in each case whether such proprietary, sensitive or confidential information is written, electronic, oral, or visual and whether or not marked or identified as proprietary, sensitive or confidential.

Effective Useful Life (EUL): An estimate of the median number of years that an installed measure will be in place and operable. EUL values are for new equipment and are provided as years. Measure-specific EUL values allow for determination of lifetime energy savings and Levelized Cost.

Gas Kicker: The 2x payment multiplier that will be applied to natural gas Payable Energy Savings that occur in January and February of a Project's Performance Period when calculating a Portfolio's Payment Recommendation.

Initial Intervention Start Date: The date that a Portfolio Manager first begins an Intervention with an eligible Customer, as defined in the solicitation. The customer's energy usage during the previous 13 months serve as the baseline, or pre-intervention, period against which future energy savings will be measured. Portfolio Managers provide the Initial Intervention Start Date for each customer when submitting a Project to be added to their Portfolio.

Initial Intervention End Date: The date that marks the end of the Initial Intervention Period. The following 36 months will serve as the Performance Period, during which the customer's energy usage will be compared to the baseline period to determine Payable Energy Savings. Portfolio Managers provide the Intervention End Date for each Customer when submitting a Project to be added to their Portfolio.

Initial Intervention Period: The time between the Initial Intervention Start Date and Initial Intervention End Date.

Initial Payment: Payment made as part of a quarterly performance payment to a Portfolio Manager following an Intervention and on an annual basis thereafter. The payment will be based on 50 percent of a Project's Predicted Annual Savings (capped at 12.5% of baseline consumption) or prior year meter-based savings and the Portfolio Manager's Payment/Energy Unit value.

Implementation Period: The two-year period during which Portfolio Managers can add Projects to their portfolio commencing on the Portfolio Manager contract start date.

Intervention: Implementation of energy efficiency measures at a given point in time.

Levelized Cost (also known as Levelized Cost/MMBtu): The Levelized Cost/MMBtu will be calculated by dividing the Bid by the expected lifetime savings of a proposer's portfolio. This value is calculated in Attachment A and bidders will be compared using this value.

Non-Routine Adjustment (NRA): A projected savings value used to replace Payable Energy Savings in the event of a Non-Routine Event at a Project site.

Non-Routine Event (NRE): Changes in building energy use that are not attributable to changes in the independent variables used in the baseline model nor to the Intervention that occurred at the Project site.

Participating Customers: Eligible Customers who elect to participate in the P4P Pilot by signing a contract with one of the contracted Portfolio Managers in exchange for energy efficiency services.

Payable Energy Savings: The reduction in weather-normalized metered energy consumption from the pre-period to the post-period achieved through the implementation of energy efficiency Interventions. These estimated savings will be provided using the CalTRACK methods.

Payment/Energy Unit: Payments will be calculated using these values and multiplying by the Payable Energy Savings for the applicable fuel type. This value is calculated in Attachment A.

Payment Recommendation: Formal recommendation of a payment to be made from Con Edison to a Portfolio Manager, generated by the AMV Platform quarterly, based on Basis-of-Payment and Payment/Energy Unit.

Performance Period: The three-year time period following the Initial Intervention End Date during which a customer's energy usage will be compared to the baseline period to determine that customer's energy savings. Portfolio Managers may re-intervene with the Customer at any time during this period to increase savings.

Portfolio: Set of Projects for which a Portfolio Manager will be paid during the individual Projects' Performance Periods.

Portfolio Manager: An energy service provider that is awarded a contract under the Business Energy Pro Pilot and is being compensated at the Payment/Energy Unit rate for delivered energy savings during the contracted term. Portfolio Managers may be loan providers, technology vendors, contractors, energy service companies, or other program implementers.

Predicted Annual Savings: Electric and natural gas values to be provided by Portfolio Managers when submitting a Project to their Portfolio via their CRM or similar project tracking software. Predicted savings should be consistent with values provided in the Portfolio Manager's Bid Package Workbook submitted in response to this solicitation or a reputable source, such as the New York State Technical Resource Manual.

Project: An Intervention or set of Interventions that impacts energy consumption as measured by utility meters (defined by unique meter IDs) for a Customer (defined by a unique utility account ID) occurring at a specific location (defined by a site ID). The required Project data and Customer authorizations for data sharing must be provided for a Project to be added to a Portfolio Manager's Portfolio.