**NYSERDA FlexTech Consultants**

**Case Study Guide**

**Introduction**

**What is the purpose of this document?**

This document is a guide to be used by FlexTech Consultants to verify clean energy activities and/or provide information to inform the development of concise and compelling case studies.

Case studies published as promotional materials must have been completed within the last three years and cover:

* projects included in your firm’s RFP 3628 proposal OR
* projects included with your annual report submission OR
* projects completed through a NYSERDA program

**What should I do with this document?**

Fill out each section completely to the best of your knowledge—bullet points are acceptable as long as they provide sufficient detail. The goal is to capture the story behind a project and detail the multiple benefits observed, not just simply state the organization name and energy cost savings. This may require you to reach out to your client to obtain additional details.

**Can I submit a case study in lieu of completing this form?**

Yes! But ensure all information requested in this form is already included in the case study. If some of the information in this form is not included in the case study, feel free to fill in parts of this form to supplement the case study.

**Do I need to get permission from my client to feature them?**

Yes, and you should get this in writing. You must complete NYSERDA’s [Project Information Release form](https://www.nyserda.ny.gov/-/media/Files/Programs/FlexTech/Project-Information-Release.pdf), which gives NYSERDA permission to use details of a project in promotional materials.

**Can I provide information on a project that did not participate in NYSERDA’s FlexTech program?**

Yes. We recognize some consultants may have experience providing services both through the FlexTech program and outside of it. As a result, you are free to submit work from outside of the FlexTech program; however, the project must have been included in your firm’s RFP 3628 proposal, annual report submission, or it must have gone through one of NYSERDA’s programs. Contact [FlexTech@nyserda.ny.gov](mailto:FlexTech@nyserda.ny.gov) for special requests.

**Who do I send this completed form to?**

This form can be uploaded to your firm’s annual report or emailed to [FlexTech@nyserda.ny.gov](mailto:FlexTech@nyserda.ny.gov).

**What will happen after I complete and submit this form?**

NYSERDA will review the information provided to verify it meets requirements. If you’ve elected for this information to be developed into a cobranded case study, NYSERDA will draft a copy based on the details you provide and put it into a layout template that features logos from both NYSERDA and your organization. You will have a chance to review the content prior to publishing.

**How will case studies be shared?**

Case studies will be posted as a PDF on the NYSERDA [FlexTech Consultant website](https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/FlexTech-Consultants). You will also be able to publish the PDFs on your own website as well as share them directly with your prospective clients, without the need for prior approval from NYSERDA.

**Project Information**

**FlexTech Consultant Information**

Organization name: Click or tap here to enter text.

Staff member(s) from your firm that were involved with the project:

1. Contact name: Click or tap here to enter text.

Email address: Click or tap here to enter text.

Phone number: Click or tap here to enter text.

1. Contact name: Click or tap here to enter text.

Email address: Click or tap here to enter text.

Phone number: Click or tap here to enter text.

**The Basics**

1. **The project covered in this case study (select, or explain below):**

|  |  |  |
| --- | --- | --- |
| was included in RFP 3628 proposal | was included in annual report submission | participated in NYSERDA Program (if selected, list program below) |

**NYSERDA Program:** Click or tap here to enter text.

**If the project doesn’t fall into the boxes above, explain this project’s background:**

Click or tap here to enter text.

1. **Client company name:** Click or tap here to enter text.
2. **Client Address:** Click or tap here to enter text.
3. **Industry sector (select):**

|  |  |  |
| --- | --- | --- |
| Agriculture | Data Center | Industrial |
| Colleges/Universities | Government | P-12 School |
| Commercial Office | Healthcare | Not-for-Profit |
| Commercial Retail | Hospitality | Other (if selected, explain below) |

**If Other:** Click or tap here to enter text.

1. **Number of buildings:** Click or tap here to enter text.
2. **Square footage (for each building or total, as appropriate):**

Click or tap here to enter text.

1. **Project complete date:** Click or tap here to enter text.
2. **Project type (select all that apply):**

|  |  |  |
| --- | --- | --- |
| Agricultural | Energy Advisor Services | Industrial and Process Efficiency |
| Alternate Fuel Technologies | Energy Procurement | Peak Load Reduction Strategy |
| Carbon Mitigation Strategy | Energy Storage | Renewable Generation |
| Combined Heat and Power | General Feasibility Study | Retro-Commissioning |
| Data Center Efficiency Analysis | Clean Heating and Cooling | Clean Energy Activity |
| Distributed Generation | High Performance Building | Water/Wastewater Service |
| Other (if selected, explain below) | | Net Zero |

**If Other:** Click or tap here to enter text.

**Energy Study Background & Results**

1. **What was the client’s motivation(s) for pursuing an energy study? What were the client’s/facility’s needs?**

Click or tap here to enter text.

1. **What services did you provide and what tasks did you complete as part of the study?**Provide detail around each pertinent task of the project, from initiation to completion; details around coordinating with the client, establishing baseline energy use, details around the analysis completed, and how you determined recommendations. Additional services that you provided as a result of the study may also be mentioned. A detailed, bulleted list or paragraphs are acceptable.

Click or tap here to enter text.

1. **Recommendations**

Note:You may submit the NYSERDA-approved project summary sheet(s) in lieu of filling out this section.

Within the table below:

* List the opportunities/recommendations identified and provided to the client.
* Include the estimated energy and cost savings for each.
* Provide the totals for values in each column within in the last row of the table (highlighted blue).
* You may modify this table to account for other fuel sources/energy units, as needed (i.e. replace gas and MMBTU with appropriate fuel type and units, or add an additional column for additional fuel type and units).

|  |  |  |  |
| --- | --- | --- | --- |
| **Measure/Measure Description** | **Annual Electric Savings (kWh)** | **Annual Gas Savings (MMBtu)** | **Annual Cost Savings ($)** |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
| **Total:** |  |  |  |

1. **Simple Payback**

* Simple Payback (years, before incentives): Click or tap here to enter text.

1. **Additional Benefits**

What benefits were observed beyond energy savings (e.g. occupant comfort, productivity, etc.)?

Click or tap here to enter text.

1. **Post-Study/Next Steps**

Did the client implement recommendations from the energy study? What additional projects/initiatives did the client move forward with as a result of the study?

Click or tap here to enter text.

1. **Client Investment (optional)**

* Project or study cost (before any incentives, if applicable): Click or tap here to enter text.
* Incentives provided (if applicable – identify the incentives and indicate if the incentives are for the study or implementation): Click or tap here to enter text.
* Total study cost to client: Click or tap here to enter text.

**Client Testimony (optional, but highly encouraged)**

Have your client respond to any or all of the following prompts in their own words. Send them these questions and copy/paste their responses below. These quotes may be used in case study copy.

* What was the best part or biggest benefit of your experience?

Click or tap here to enter text.

* What advice would you give to a peer organization considering an energy study?

Click or tap here to enter text.

* Do you have any additional thoughts or information you would like to us to know?

Click or tap here to enter text.

**Has the client given permission to use this information?**

Yes  No

**Images**

**Provide an image or images representing your project and your company logo. If you do not have an image or if the image you provide does not meet quality standards, a stock image will be used in its place.**

**Subject matter (in order of preference):**

* Someone from your organization and/or your client’s organization interacting
* Someone from your organization and/or your client’s organization inspecting/performing work
* Interior shot of your client’s facility/property
* Exterior shot of your client’s facility/property

**Project Image Guidelines:**

* Landscape orientation (horizontally aligned)
* File type: JPG
* Resolution: 300 dpi
* You must have permission to use this image and (using the attached release form) be able to grant NYSERDA permission to use this image

**Logo Guidelines:**

* Transparent background
* Include any style guidelines or use requirements
* File type: Vector/EPS (preferred), PNG, GIF or JPG
* Resolution (for non-vector files): 300 dpi

**Questions?**

If you have any questions, please contact [FlexTech@nyserda.ny.gov](mailto:FlexTech@nyserda.ny.gov)