

**Flexible Technical Assistance (FlexTech)  
Addendum to Program Opportunity Notice (PON) 4192  
Effective Date: June 15, 2020 – June 30, 2021**

For FlexTech applications submitted from **June 15, 2020** through **June 30, 2021**, the following updates to PON 4192 will apply:

Up to 100% Study Cost-Sharing with Proof of Installation

NYSERDA will reimburse FlexTech customers the remaining portion of their eligible energy efficiency or clean heating and cooling study costs upon installation of measure(s) recommended through an approved FlexTech energy study.

Reimbursement amount will be paid at the lesser of:

- Balance of eligible study costs, not to exceed 100% of the total qualifying study cost OR
- Installed measure costs

Total NYSERDA contribution (cost-share and reimbursement) will be capped at \$500,000 per study.

Technical Assistance Services		Standard NYSERDA: Cost Share	REV Campus Challenge Member: NYSERDA Cost Share <sub>1</sub>	NYSERDA Cost Share Cap per Project
Primary Services	Level 1+ Energy Study	50% Study Cost Share	60% Study Cost Share	up to \$10,000 per building
	Targeted or Comprehensive Energy Study Targeted or Comprehensive RCx Study Climate Action Plan or Sustainability Plan Clean Heating and Cooling Study Energy Master Planning Energy Advisor Services	Reimbursement of up to 100% of eligible study cost upon measure implementation <sub>3,4</sub>	Reimbursement of up to 100% of eligible study cost upon measure implementation <sub>3</sub>	up to \$500,000 or 10% Annual Energy Expenditure, whichever is less
	Energy Storage (ES)	75%	75%	up to \$100,000 or 10% Annual Energy Expenditure, whichever is less
<i>The following supporting services are eligible if completed in combination with any of the primary services above.</i>				
Supporting Services <sup>2</sup>	Investigation of renewable energy technologies	50%	60%	
	Complete greenhouse gas emission inventory			
	Installation of permanent meters or permanent sub-meters			\$10,000
	Establish reporting protocol and report to voluntary third-party certification organizations	REV CC Only		
	Utilize a student intern	REV CC Only	up to \$10,000 of intern fees	
	Develop curriculum/student clean energy engagements	REV CC Only	75%	\$10,000

1. Colleges and Universities must be REV Campus Challenge members to receive a cost-share of any kind.  
2. Supporting Services are only eligible for a NYSERDA cost-share if completed in combination with a Primary Service.  
3. For FlexTech applications submitted from June 15, 2020 through December 31, 2021; contingent on the eligibility & requirements outlined in the PON 4192 Addendum.  
4. L1+ studies of multifamily facilities are ineligible for reimbursement.

All other program eligibility requirements, program parameters, and limitations as outlined in PON 4192 remain the same.

Reimbursement Eligibility

To be eligible for reimbursement:

- A complete FlexTech application, which includes the FlexTech Program Application, a complete Scope of Work with a detailed budget and schedule, and the CFA, must have been submitted between June 15, 2020 and June 30, 2021.

- The installed measure(s) must be listed as recommended by the customer’s energy consultant in the NYSERDA approved final report.
- Reimbursement will be made only when the capital costs of the energy efficiency or clean heating and cooling-related measure(s) implemented meet or exceed the amount being requested for reimbursement.
- Installation of new measures reliant on fossil fuels are ineligible for reimbursement, however investments which reduce fossil fuel consumption through heat recovery or other controls are eligible for reimbursement.

For FlexTech Applications received on or after January 1, 2021:

- Reimbursement is not available for the installation of lighting or lighting control measures.
- Multifamily facilities:
  - Must evaluate electrification (i.e. clean heating and cooling measures<sup>1</sup>) or electrification readiness<sup>2</sup> as part of the NYSERDA-approved FlexTech scope of work in order to be eligible for reimbursement.
  - Level 1+ studies of multifamily facilities are ineligible for reimbursement.

How to Apply for Reimbursement

Reimbursement requests will be accepted on a first-come, first-serve basis. Customers must submit a Reimbursement Requests Form, found at [www.nyserdera.ny.gov/FlexTech](http://www.nyserdera.ny.gov/FlexTech) along with sufficient proof of purchase documentation to [FlexTech@nyserdera.ny.gov](mailto:FlexTech@nyserdera.ny.gov) within 2 years of the NYSERDA issued Purchase Order (PO) date. Proof of purchase for the installed measure(s) must be dated after the NYSERDA PO date for the approved energy study application. Reimbursement payments will be issued directly to the Customer upon receipt and verification of required documentation.

**Additional Terms and Conditions:**

By submitting an application to PON 4192 between June 15, 2020 and June 30, 2021, the FlexTech Consultant, Independent Service Provider and Customer accept these additional Terms and Conditions:

- NYSERDA will closely monitor project costs. Applications and scopes of work that include falsified information may result in reduced cost-share, reduced reimbursement, study termination or other ramifications at NYSERDA’s discretion.
- Invoices submitted to NYSERDA must include additional detail to account for actual time spent by the energy study consultant on study-related efforts.

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<sup>1</sup> Studies focused on building improvements that transition at least one heating and/or cooling or domestic hot water system to a high-performance electric technology, such as ground source heat pumps, air source heat pumps, variable refrigerant flow systems, and/or technologies that are in alignment with NYS Clean Heat Program. NYSERDA reserves the right to determine the eligibility of proposed clean heating and cooling measures relative to the reimbursement offering.

<sup>2</sup> Studies focused on building improvements that significantly reduce heating and/or cooling load and/or can directly enable future electrification, such as substantial building envelope improvement measures. NYSERDA reserves the right to determine the eligibility of proposed electrification readiness measures relative to the reimbursement offering.

- Reimbursement requests will be accepted on a first-come, first-serve basis only for eligible applications received between June 15, 2020 and June 30, 2021.
- The Reimbursement Request Form and sufficient proof of purchase documentation must be submitted within 2 years of the NYSERDA issued Purchase Order date.
- The Reimbursement Request Form must only include installed measure(s) that were recommended by the customer's energy consultant in the NYSERDA approved final report.
- Reimbursement will be made only when the capital costs of the energy efficiency or clean heating and cooling-related measure(s) implemented meet or exceed the amount being requested for reimbursement.
- Reimbursement is not available for the installation of new fossil fuel-based measures.
- Reimbursement is not available for the installation of lighting or lighting control measures for FlexTech applications received on or after January 1, 2021.
- Proof of purchase for the installed measure(s) in the Reimbursement Request Form must occur after the NYSERDA Purchase Order date.
- Reimbursement payments will be provided directly to the Customer upon receipt and verification of required documentation.
- Reimbursement amounts will be paid at the lesser of remaining eligible study costs or installed measure costs.
- NYSERDA reserves the right, for any reason, to lower or cap reimbursement amounts or discontinue approving requests for reimbursement at any time.
- NYSERDA reserves the right to limit the number of applications per customer and per energy consultant.