

FlexTech and AMEEP

How They Work Together

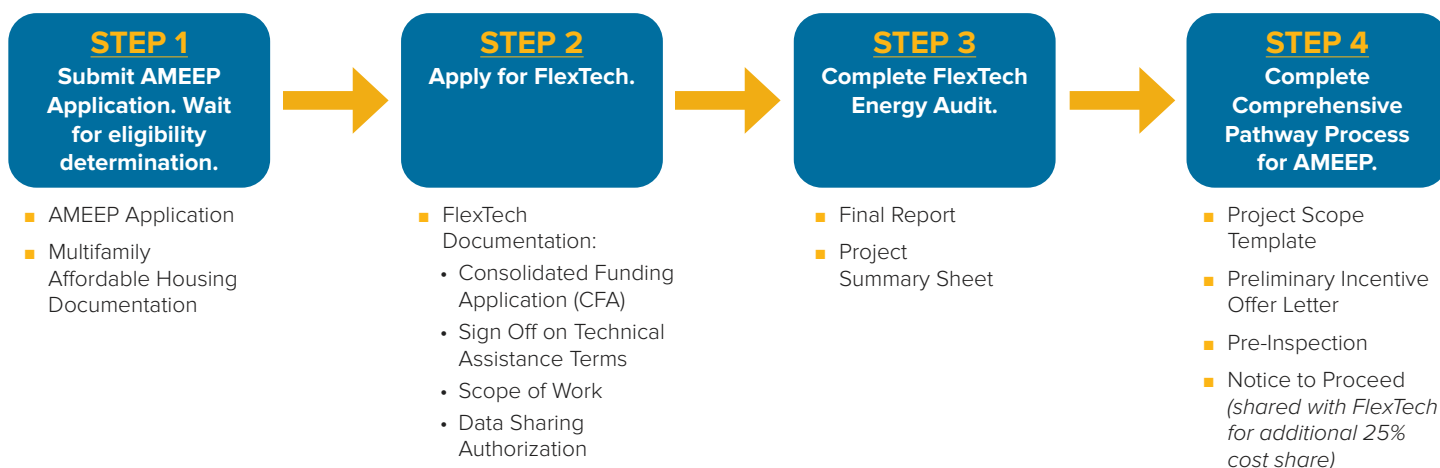


A FlexTech energy audit must be performed to participate in the “Comprehensive Pathway” of the [Affordable Multifamily Energy Efficiency Program](#) (AMEEP).

NYSERDA’s [FlexTech program](#) offers a 50% cost share – reimbursed once the assessment is completed – and an additional 25% cost share if the project is approved to participate in AMEEP. The building owner must apply and qualify for each program to take advantage of the incentives. There are two approaches for using AMEEP and FlexTech together. Both are outlined in detail in this document.

Approach 1 – Apply through AMEEP (preferred)

This approach starts with an AMEEP application submitted to the utility’s implementation contractor (IC). The IC will guide the customer through the application process, which includes sending the AMEEP application to FlexTech.



The AMEEP application will serve as the application to FlexTech.

Step 1: Submit AMEEP Application. Wait for eligibility determination.

- Submit the [AMEEP Application](#) and affordable housing documentation to the utility’s IC. The IC reviews the application package and confirms (a) if the building qualifies as affordable and (b) the project is eligible for AMEEP.
- Review the [AMEEP Program Manual](#) (p.8-10) for information on affordable housing verification and acceptable documentation.

Step 2: Apply for FlexTech.

- The IC will send the approved AMEEP application, affordable housing documentation, and Scope of Work (SOW) to NYSERDA for FlexTech approval.
- Submit the following program documents to NYSERDA at flextech@nyserdera.ny.gov:
 - [Consolidated Funding Application](#) (CFA) & Technical Assistance Terms
 - [Scope of Work](#)
 - [Data Sharing Authorization](#)
- NYSERDA will assign a Project Manager (PM) and send an email within **1–2 days** acknowledging receipt of documents.
- NYSERDA will review documents, issue SOW comments, then schedule a scoping call within **1 week** of receiving the application.
- Provide responses to the comments and send a revised SOW to NYSERDA within **30 days**. Please note: It may take more than 1 round of comments to finalize the SOW.
- NYSERDA will send out an approval email once the SOW is approved.
- NYSERDA will then issue a Purchase Order (PO) and Notice to Proceed (NTP) within **4–6 weeks** of SOW approval. The FlexTech energy audit can begin once the PO and NTP are issued.

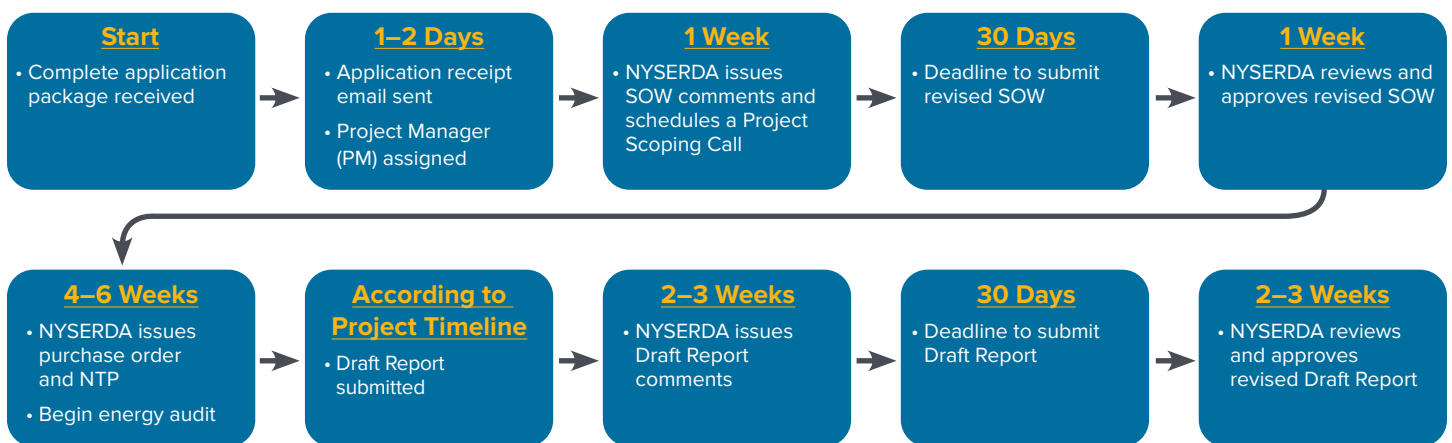


NYSERDA

Step 3: Complete FlexTech Energy Audit.

- After completing the FlexTech audit, complete the two deliverables – a Draft Report per [Report Guidelines](#) and a [Project Summary Sheet](#) (PSS).
- Submit both deliverables to NYSERDA at flextech@nyserdera.ny.gov according to the agreed upon project timeline in the SOW.
- NYSERDA will perform a technical review of the deliverables and issue Draft Report comments within **2–3 weeks**.
- Provide responses to the comments and submit a revised Draft Report within **30 days**.
- It will take approximately **2–3 weeks** after the revised Draft Report is received for the final Draft Report to be approved.
- Once the Draft Report has been approved, NYSERDA will send out an approval email.
- NYSERDA will pay a 50% cost share of the total study cost directly to the provider, if the provider is a FlexTech consultant.
 - A building owner can use an Independent Service Provider but must pay for the cost of study upfront and apply for a reimbursement from NYSERDA. Refer to the Project Payments section of the [FlexTech Program Guidelines](#) for more details on the payment process.
- After the 50% cost share has been paid, NYSERDA will transfer the Final Report and PSS back to the utility's IC.

FlexTech Project Milestones



Please Note:

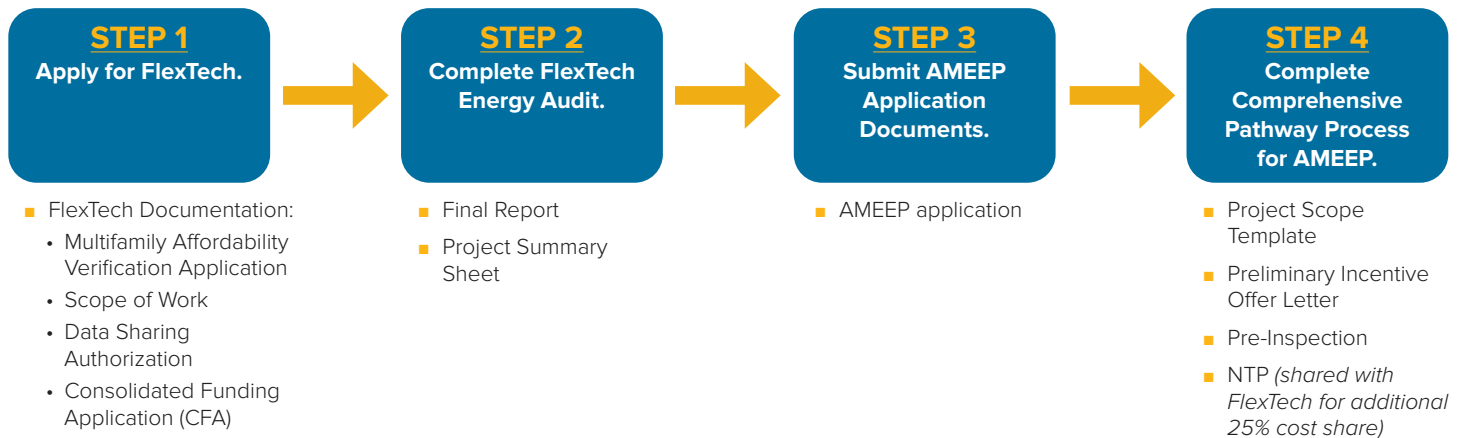
- SOW and Draft Reports may require more than one round of comments
- Failure to submit items within specified timeline may result in cancellation

Step 4: Complete Comprehensive Pathway Process for AMEEP.

- Finalize the scope and initiate the project:
 - Fill out a Project Scope Template provided by the IC.
 - Receive Preliminary Incentive Offer Letter from the IC.
 - Design new systems, hire contractors, submit cut sheets, and savings calculations (such as energy model or TRM based savings calculations accounting for interactive effects).
- AMEEP Application Approval:
 - Perform Pre-Inspection and engineering review.
 - Receive NTP – triggers additional 25% audit cost share, up to 75% cost share of the overall study cost, from NYSERDA FlexTech. Please note: The NTP from AMEEP must be issued within **6 months** of the FlexTech audit report being approved by NYSERDA to qualify for the additional cost share.
- Complete project:
 - Install equipment.
 - Receive mid-project payment (optional).
 - Submit completion paperwork.
 - Post inspection and final engineering review.
 - Receive incentive payment.

Approach 2 – Apply through FlexTech

If a project is already going through a FlexTech study, and there is interest in the AMEEP program, the Energy Service Provider or the customer should contact FlexTech and their utility's IC to coordinate.



Step 1: Apply for FlexTech

- FlexTech energy audits must be conducted by an approved Energy Service Provider. Choose an Energy Service Provider through either of the following two networks:
 - [NYSERDA Multifamily Building Solutions Network](#)
 - [NYSERDA FlexTech Consultants](#)
- Submit all of the following documents to FlexTech at flextech@nyserda.ny.gov to apply to the FlexTech Program:
 - [Program Application](#)
 - [Multifamily Affordability Verification Application](#)
 - [Scope of Work](#) (SOW)
 - [Data Sharing Authorization](#)
- NYSERDA will assign a Project Manager (PM) and send an email within **1–2 days** acknowledging receipt of documents.
- NYSERDA will review your application materials, issue SOW comments, and schedule a project scoping call within **one week** of receiving your application. Respond to the comments and send a revised SOW to NYSEDA within **30 days**. It can take up to **one week** after the revised SOW is received for your final SOW to be approved by NYSEDA. Please note that it may take more than one round of comments to finalize the SOW.
- NYSERDA will send out an email when the SOW has been approved.
- NYSERDA will issue a Purchase Order (PO) and Notice to Proceed (NTP) within **4–6 weeks** of SOW approval. Once the PO and NTP are issued, the FlexTech audit can begin.

Step 2: Complete FlexTech Energy Audit

- When the FlexTech audit is complete, submit the project deliverables (Draft Report per [Report Guidelines](#) and [Project Summary Sheet \(PSS\)](#)) to NYSEDA at flextech@nyserda.ny.gov according to the agreed upon project timeline in the SOW.
- NYSERDA will perform a technical review of the project deliverables and issue Draft Report comments within **2–3 weeks**. Address the comments and submit a revised Draft Report within **30 days**. It will take approximately **2–3 weeks** after the revised Draft Report is received for your final Draft Report to be approved by the PM. Please note that it may take more than one round of comments to finalize the Draft Report.
- NYSERDA will pay a 50% cost share of the total study cost directly to the provider, if the provider is a FlexTech consultant.
 - A building owner can use an Independent Service Provider but must pay for the cost of study upfront and apply for a reimbursement from NYSEDA. Refer to the Project Payments section of the [FlexTech Program Guidelines](#) for more details on the payment process.*
- NYSERDA will ask Provider to confirm customer interest in participating in AMEEP. If the customer plans to participate in AMEEP, NYSEDA will transfer the Final Report, Project Summary Sheet, Affordable Housing Documentation and Verification to the utility's IC.

Step 3: Submit AMEEP Application Documents

- To apply for AMEEP, you must submit an AMEEP application for a Comprehensive Pathway. The IC will review your application to confirm that your project is eligible for AMEEP.
 - Click here for link to [AMEEP Application](#)

Step 4: Complete Comprehensive Pathway Process for AMEEP

- Finalize Scope and Initiate Project:
 - Fill out a Project Scope Template (IC will provide).
 - Receive Preliminary Incentive Offer Letter.
 - Design new systems, hire contractors, submit cut sheets and savings calculations (such as energy model or TRM based savings calculations accounting for interactive effects).
- AMEEP Application Approval:
 - Perform Pre-Inspection and engineering review.
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- Complete Project:
 - Install equipment.
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