

## ATTACHMENT B OsEM Concept Requirements

The OsEM concept must include and describe:

1. **Existing Conditions:** Identify existing facility conditions and assumptions that will allow for successful completion of the Scope of Work (SOW). Provide a list of the buildings that are included in the engagement, including the Property Name, Primary Street Address, City, Zip Code, and Number of Units (if applicable). If the OsEM application includes buildings that have recently applied for and/or completed FlexTech studies, explain how the OsEM will leverage the FlexTech study(ies) while avoiding duplication.
  2. **Current state of energy management:** Describe the current energy management practices at the facility & the long-term need/ desire for an OsEM, including:
    - Background that explains special need/desire for an OsEM.
    - Plan for incorporating the OsEM into the broader team (account for operations and business process).
    - Description of existing:
      1. Organizational cultures, especially energy, sustainability, safety, and quality and awareness training programs
        - Is there a corporate electrification plan/ target?
      2. Energy tracking and monitoring system
      3. Cross-functional energy team
  3. **OsEM Integration**
    - Demonstrate how the OsEM will be incorporated into the existing business structure by including a description of:
      1. The individual at the facility(ies) who will be responsible for overseeing the effort and ensuring successful integration of the OsEM and how the OsEM reports into the broader organization (could include an organizational chart).
      2. The intent to continue the role post Program engagement.
      3. How results and lessons learned will be shared to further the Program's objective of increasing the penetration of energy managers at comparable facilities.
      4. What data and other support will be available to the OsEM to enable successful performance of duties.
      5. An on-site workspace (with computer and phone).
    - Describe how the OsEM role will be fulfilled:
      1. New permanent hire
        - If the new permanent hire is not yet identified, the job description which reflects the Program criteria must be included.
      2. Supplementing permanent staff with contracted staff
      3. Contracted staff
        - Contracted OsEM support may be selected from NYSERDA qualified FlexTech Consultant from the list (<http://www.nyserda.ny.gov/Contractors/Find-a-Contractor/FlexTech-Consultants>) or an Independent Service Provider.
        - The specific staff member who will be performing the OsEM role must be identified in the scope of work. There must be one dedicated individual who performs the on-site services and is the direct customer contact. It is acceptable to have junior Consultant staff perform lower-level administrative tasks, although such delegation should not hinder the Program's intention of demonstrating the business case for a dedicated energy manager. Unless otherwise approved by NYSERDA, the OsEM must account for a minimum of 75% of the total hours funded under the engagement. The resumes of all Consulting staff involved must be included in the proposal.
  4. **Preferred (not required) Experience**
    - Show ability to implement sizeable (>1,000 MWh electric or > 10,000 MMBtu fossil fuel), complicated (multi measure) energy and/or productivity projects.
    - Note OsEM resume is a required attachment; please see PON Section III for OsEM Application & Required Documentation.
4. **Facility energy acuity and project implementation history**
    - Provide existing corporate sustainability or energy goals.
    - Highlight independent or peer recognition for energy projects.
    - Experience implementing energy efficiency projects on the scale proposed.