RTEM + Tenants - Semi-Annual Service Report Guidelines

Please use the following guidelines to formulate a comprehensive RTEM + Tenants Semi-Annual Service Report during the appropriate project schedule stated in the corresponding RTEM contract addendum.

This document should be used together with the Data Submittal Guidelines when submitting data following RTEM + Tenants program requirements.

The purpose of the semi-annual service report is to track progress through actionable insights that address energy consumption behavior, operational stray, ECM identification, and provide CapEx improvements that will help lead to customer implementation.

According to the approved Tenant Engagement Plan, the report must also update the activities, and any measureable progress engaging office tenants in energy management and conservation practices.

1. Service Period

1.1. Start of Service Period: MM/DD/YYYY

1.2. End of Service Period: MM/DD/YYYY

2. Building Energy End-Use Breakdown

This section reports the building's utility consumption and breakdown by major end-use in the building.

2.1. Utility Consumptions:

This table will report the accumulated energy consumption of each utility during the service period in energy units. If the accumulation period is different from the service period dates, then explicit **Start** and **End** dates for each utility must be specified.

Utility	Consumption Period		Consumption Quantity
	Start	End	
Electricity	mm/dd/yyyy hh:mm	mm/dd/yyyy hh:mm	### (kWh)
Natural Gas	mm/dd/yyyy hh:mm	mm/dd/yyyy hh:mm	### (Therm)
District Steam	mm/dd/yyyy hh:mm	mm/dd/yyyy hh:mm	### (Mlb)
Fuel Oil	mm/dd/yyyy hh:mm	mm/dd/yyyy hh:mm	### (Gal)
Other	mm/dd/yyyy hh:mm	mm/dd/yyyy hh:mm	###

2.2. Major Energy End-Uses

These tables will report the major-end uses of each utility during the service period, expressed in percentages out of a total of 100% per utility. Any change to the disaggregation methods from the project's Contract Addendum must also be explained. End-use for each utility may be reported in separate tables or as a combined table.

The following (3) tables have been added as an example, but **all** primary energy sources must be reported on, not just those provided here, if present (e.g. Fuel Oil, Distributed Energy Resources).

Utility	Quantity	Major End-Uses	Percentage
Electricity	### (kWh)	Sensible and Latent Cooling	12%
		Ventilation	10%
		Lighting	12%
		Network/Data Center	5%
		Elevators/Transport	4%
		Miscellaneous Electric Load	3%
		Others	2%
		Tenant End-Uses	52%
		Total Electricity Usage:	**100%**

Utility	Quantity	Major End-Uses	Percentage
Natural Gas	### (Therm)	Comfort Heating	72%
		Domestic Hot Water	12%
		Food Preparation	5%
		Tenant End-Uses	11%
		Total Natural Gas Usage:	**100%**

Utility	Quantity	Major End-Uses	Percentage
District Steam	### (Mlb)	Comfort Heating	100%
		Tenant End-Uses	0%
		Total District Steam Usage:	**100%**

3. Building Systems and Common Spaces ECMs

3.1. ECMs Defined:

Level 1: Closing of Operational Stray - *Minimal cost measures*

Level 2: Traditional ECMs - *Additional non-capital, moderate cost measures*

Level 3: Capital Expenditure Justification - *New high cost, mechanical equipment*

3.2. Summary Table of RTEM findings for the Service Period:

This table will summarize cost savings for implemented measures and O&M adjustments, along with any other recommendations. Please be sure to represent "true" realized savings, not anticipated savings. Be sure to include any additional cost savings in the "Total Cost Savings" section, i.e., water use reduction, steam savings, on-site generation, etc.

Service Report Summary – Implemented ***(within 6-month service period)***	
Electric Savings (kWh)	kWh Saved
Gas Savings (MMBtu)	MMBtu Saved
Energy Cost Savings - Electric	$ Saved
Energy Cost Savings - Gas	$ Saved
Total Cost Savings - O&M/Energy	$ Saved

Support all calculations within the report or in a separate worksheet for NYSERDA review.

3.3. Table of Recommendations:

This table should include all recommended ECMs. Status updates are required, they should indicate whether recommendations have been accepted and implemented, accepted and in planning, identified for further studies, under review, or rejected. Each recommendation should include the anticipated savings or achieved savings for the given 6-month service window. If the recommendation has been implemented, please include the implemented date.

Recommendation Table							
Number	**Recommendation**	**Status**	**Electric Savings (kWh)**	**Gas Savings (MMBtu)**	**Cost Savings for Service Period ($)**	**Annualized Cost Savings ($)**	**Implementation Date**
1	Delay Start-Up…	Accepted / Implemented	### kWh	### MMBtu	$$	$$$	mm/dd/yyyy
2	Decrease Set Point …	Rejected	### kWh	### MMBtu	$$	$$$	
3	Repair Valve…	Accepted / In-Planning	### kWh	### MMBtu	$$	$$$	
4	Install VFD…	Under Review	### kWh	### MMBtu	$$	$$$	
5	Replace RTU…	Identified for Further Study	### kWh	### MMBtu	$$	$$$	

3.4. Descriptive Narrative:

Support each recommendation with a descriptive narrative that presents your findings

- Please identify each supporting narrative with the recommendation number used in the RecommendationTable.
- Please include or reference all analytics, calculations, charts and data that support each recommendation. Support all calculations in a separate worksheet for NYSERDA review.
- Please include and differentiate between new energy measures (equipment), new controls and operational adjustments on existing equipment controls (i.e., hours of operation, control sequences, etc.).
- In this section please include any CapEx improvements or long-term project scheduling.

Data employed in Semi-Annual Service Report (submitted in separate Excel CSV Files)

4. Tenant Energy Management

This section reports the ongoing engagement of the site's commercial tenants in energy management initiatives according to the site's Tenant Engagement Plan approved by NYSERDA.

4.1. Communications and Activities:

Summarize communications and activities with the tenants during the service period. Highlight challenges and accomplishments in promoting awareness and participation.

4.2. Tenant Energy End-Use Breakdown:

These tables will report major-end uses for each tenant's space, as recorded by the tenant's submeter during the service period expressed in percentages out of a total of 100%. Any change to the disaggregation methods from the project's Contract Addendum must also be explained.

4.2.1. Tenant Name:

Utility	Quantity	Major End-Uses	Percentage
Electricity	### (kWh)	Sensible and Latent Cooling	25%
		Comfort Heating	15%
		Ventilation	15%
		Lighting	22%
		Network/Data Center	15%
		Miscellaneous Electric Load	8%
Total Tenant Name Electricity Usage:			**100%**

4.2.2. Tenant Name:

Utility	Quantity	Major End-Uses	Percentage
Electricity	### (kWh)	Sensible and Latent Cooling	25%
		Comfort Heating	15%
		Ventilation	15%
		Lighting	22%
		Network/Data Center	15%
		Miscellaneous Electric Load	8%
Total Tenant Name Electricity Usage:			**100%**

4.3. Tenant Space ECMs:

For each tenant, provide a table to include all recommended ECMs. Status updates are required, they should indicate whether recommendations have been accepted and implemented, accepted and in planning, identified for further studies, under review, or rejected. Each recommendation should include the anticipated savings or achieved savings for the given 6-month service window. If the recommendation has been implemented, please include the implemented date.

4.3.1. Tenant Name:

Tenant Name							
Number	**Recommendation**	**Status**	**Electric Savings (kWh)**	**Gas Savings (MMBtu)**	**Cost Savings for Service Period ($)**	**Annualized Cost Savings ($)**	**Implementation Date**
1	Delay Start-Up…	Accepted / Implemented	### kWh	### MMBtu	$$	$$$	mm/dd/yyyy
2	Decrease Set Point …	Rejected	### kWh	### MMBtu	$$	$$$	
3	Repair Valve…	Accepted / In-Planning	### kWh	### MMBtu	$$	$$$	
4	Install VFD…	Under Review	### kWh	### MMBtu	$$	$$$	
5	Replace RTU…	Identified for Further Study	### kWh	### MMBtu	$$	$$$	

4.4. Tenant Space ECM Descriptive Narrative:

Support each recommendation with a descriptive narrative that presents your findings

- Please identify each supporting narrative with the recommendation number used in the RecommendationTable.
- Please include or reference all analytics, calculations, charts and data that support each recommendation. Support all calculations in a separate worksheet for NYSERDA review.
- Please include and differentiate between new energy measures (equipment), new controls and operational adjustments on existing equipment controls (i.e., hours of operation, control sequences, etc.).
- In this section please include any CapEx improvements or long-term project scheduling.

Data employed in Semi-Annual Service Report (submitted in separate Excel CSV Files)