

## RTEM Basic - Contract Addendum Guidelines

This document should be used as a guide when developing contracts for projects applying to NYSERDA's Real Time Energy Management Program. To ensure your projects are approved in a timely manner, please include the information in the format below as an addendum to existing system/service contracts.

### 1. Existing Conditions Summary

#### 1.1 Project Site and Equipment Summary

Describe **project site** (age, façade type, number of floors, SQFT, unit count, sector, and occupancy sub-types) and current **energy consuming systems/equipment**. Please include the quantities and rated capacities of all major mechanical systems.

#### 1.2 Site Energy Inputs and End Uses

Provide a table listing **all utilities / energy sources** that serve the site and what **end uses** utilize them (e.g. Electric for Lighting, Cooling, Plug Loads, etc.)

### 2. Scope of Work

#### 2.1 System Components

##### 2.1.1 Hardware Descriptions

Describe **all new hardware** to be installed at the site, **its intended function**, and as applicable, what **level of system** it's on (e.g. Whole building electric meter, CTs on chiller, etc.)

##### 2.1.2 Software Descriptions

Describe the software platform and its **capabilities**

##### 2.1.3 New vs Existing Monitoring and Control Equipment

Describe the existing BAS, including **brand and age**, and contrast with the proposed RTEM system and **what new functionality** is added.

##### 2.1.4 One-line Diagrams

Provide a high-level, system architecture diagram. Does not need to be site specific

#### 2.2 Service Offerings

##### 2.2.1 Uptime & Availability

Describe the **frequency at which data is collected**, how it is made available to the customer, and when the customer has access to this data

##### 2.2.2 Semi-Annual Deliverables (Report & Data)

Describe the deliverable that will be provided, what it will contain, and how frequently it will be prepared. Also, state that a **copy of the report and all associated data** will be sent to NYSERDA.

##### 2.2.3 Service Duration

Describe the contract length

##### 2.2.4 Functional Descriptions: Automation vs Consultant Base

Describe what functions are performed **autonomously by the system/software** and what functions are performed by a **human, technical consultant**

### 3. Project Responsibilities

#### 3.1 Obligation of Customer

Make sure to specify if the customer must perform or maintain any actions to ensure the system operates correctly (e.g. maintain active internet service)

##### 3.1.1 List of Contactors and Sub-contractors and their respective services

*List vendors that will be working for the customer and what service they perform*

### 3.2 Obligation of Vendor

#### 3.2.1 RTEM System Provider Responsibilities

*Describe all vendor responsibilities associated with the **RTEM system** itself. Include information on **device warranties**, if applicable*

#### 3.2.2 RTEM Service Provider Responsibilities

*Describe all vendor responsibilities associated with the RTEM services to be provided. This should include **analysis of data and generation of reports***

#### 3.2.3 List of Contractors and Sub-Contractors and their respective services

*List vendors that will be working under your company and what service they perform*

### 3.3 RTEM Specific Obligations

#### 3.3.1 Data Quality

*Describe who is responsible for **ensuring data quality** and **what actions will be taken** by each party upon discovery of an error or device failure*

#### 3.3.2 Data Path Integrity

*Describe who is responsible for **ensuring that data is securely transferred** from onsite to the cloud servers*

#### 3.3.3 Data Storage Duration

*Describe how long you are responsible for **storing data collected** and the **ownership** of the data*

#### 3.3.4 Customer Support Responsibilities

*Describe what customer support activities you provide and when they are available*

## 4. Project Schedule

### 4.1 Pre-Installation Walkthroughs

*List the anticipated NYSERDA walkthrough date (estimated 1-3 weeks after project submission)*

### 4.2 Installation Schedule

*List the timeline of all major installation activities, including **projected dates** (Month/Year)*

### 4.3 Proposed Commissioning Date

*List the **major activities** to be performed during commissioning and provide the anticipated date that it will be complete (Month/Year)*

### 4.4 Frequency of Service Deliverables to Customer and NYSERDA

*List the frequency at which service deliverables will be provided and **explicitly** state that reports and data will be sent to NYSERDA.*

## 5. Project Cost Breakdown

*State whether **Option A or B** is being used for billing structure (i.e. System, then Service or SaaS)*

### 5.1 RTEM System Costs

#### 5.1.1 Installation Breakdown

*Provide a breakout of hardware, software, engineering, and integration costs*

#### 5.1.2 Total Sum System Costs

### 5.2 RTEM Service Costs

#### 5.2.1 Annual Breakdown

*Provide a breakout of what is covered in the annual service cost*

#### 5.2.2 Total Sum Service Costs



Please include a signature block for both the customer and RTEM Vendor(s) to sign & date. After NYSDERDA review the RTEM Addendum will need to be signed by all parties involved.

Customer Name \_\_\_\_\_  
Title \_\_\_\_\_  
Signature \_\_\_\_\_  
Date \_\_\_\_\_

Vendor Name \_\_\_\_\_  
Title \_\_\_\_\_  
Signature \_\_\_\_\_  
Date \_\_\_\_\_

Any revisions to contract(s) will require NYSDERDA review for continued Program participation