

NYSERDA Real Time Energy Management (RTEM) Program Case Study Guide

Frequently Asked Questions

What is the purpose of this document?

This document is a guide to be used by NYSERDA-qualified RTEM vendors to provide information that will inform the development of concise and compelling real-time energy management cases Studies.

What should I do with this document?

Fill out each section completely to the best of your knowledge—bullet points are acceptable, as long as they sufficiently provide detail. **Please attempt to answer every section to the best of your ability; the information from each section is critical to producing an effective case study.** The goal is to capture the story behind an RTEM project and detail the multiple benefits observed, not just simply state the organization name and energy cost savings. This may require you to reach out to your client to obtain additional details.

Do I need to get permission from my client to feature them?

Yes, and you should get this in writing. NYSERDA has a specific release form—Project Information Release—that gives NYSERDA permission to use details of a project in promotional materials. You can request this form from an RTEM Program Manager.

Who do I send this completed form to?

Please email the completed documents:

1. Completed Case Study Guide for each individual RTEM project
2. Customer Signed Project Information Release Form
3. Site and Dashboard Images
4. Logo File(s)

To: RTEM@nyserdera.ny.gov with the Subject Line: “RTEM Case Study – Vendor Name – Project Name”

What will happen after I complete and submit this form?

NYSERDA will draft copy based on the details you provide and put it into a layout template that features logos from both NYSERDA and your organization. You will have a chance to review the content prior to publishing.

How will these case studies be shared?

The case studies will be posted as PDFs on the NYSERDA RTEM website to be accessed by prospective program participants. You will also be able to publish the PDFs on your own website as well as share directly with your prospective clients however you wish, without the need for prior approval from NYSERDA.

Instructions

Please complete the below sections with as much detail as possible and provide all requested information. Feel free to use this document as a direct template when responding to prompts.

The Basics

Client Information

Organization name:

Location(s) serviced:

Industry/Sector:

Number of buildings AND square footage covered by RTEM:

Services provided to client:

Date the project was initiated:

Completion date:

Is this a NYSERDA RTEM Project? Y/N:

Qualified Vendor Information

Organization name:

Location:

Contact name:

Email address:

Phone number:

Organization website:

Client Investment

Project cost (before any incentives, if applicable):

Incentives provided (if applicable):

Total cost to client:

Energy Savings Results

Estimated annual energy savings (kWh):

Estimated annual energy savings (BTUs):

Estimated annual energy cost savings (\$):

[If applicable] Estimated additional energy utility savings (E. g. Water, District Steam)

Actual savings to date if applicable [Recommended savings implemented to date]

Please include any additional information regarding savings, such as time period for the savings or estimated savings for future projects either approved or in the pipeline.

Project Narrative

After considering the prompts, please replace the italicized text with your response.

What was the client's motivation(s) for pursuing RTEM?

Consider: Was there a catalyst for your client, such as the launch of a sustainability initiative or a strategic focus on continuous process improvement? Were they trying to solve a challenge such as consolidation of legacy energy management systems or minimizing reactive maintenance situations? List all motivators and challenges that influenced this project.

What solution(s) did you provide?

Consider: What existing equipment and systems were integrated into the RTEM system? What new software/hardware solutions did you provide? What types of ongoing services did you provide? Identify additional insights that benefit the client from operational and energy efficiencies. How did you further engage the client to increase the use of the RTEM system and the implementation of the RTEM services? What was the success rate of client engagement for these RTEM projects?

What benefits were observed beyond energy savings?

Dig deep on this one. How else did your client's organization improve beyond energy cost savings? A few examples: Were they able to reduce tenant hot/cold complaints? Did they impact employee productivity? Were they able to spot a potential failure to a critical piece of equipment? Did they save on maintenance costs/outside service vendor costs? Where it's possible, quantify these benefits.

What's next?

Is your client considering additional energy efficiency or clean energy projects? What next steps does the client anticipate taking as a result of the outcomes from implementing RTEM? How are they using the data and analysis to inform future projects?

Client Quotes:

Have your client respond to the following prompts in their own words. Send them these questions and copy/paste their responses below. These quotes may be used in case study copy.

- What was the biggest benefit that came out of your RTEM experience?
- What was the biggest challenge to implementing RTEM and how did you overcome that challenge?
- What factors do you feel were critical to the success of the project?
- What advice would you give to a peer organization considering RTEM?
- Do you have any additional thoughts or information you would like to us to know?

Has the client given permission to use this information?

Yes No

Optional Interview

In order to develop a compelling, detail-rich case study, NYSERDA would like to offer the opportunity for the vendor and/or client to participate in a 30-minute phone interview. NYSERDA's marketing staff and writer will dig into some of these questions in more detail and get a better understanding of the client and the project. The interview is not required as part of the case study development process, but it is encouraged.

Project and Technology Images

Please provide the images listed below as separate files

If possible, include an image or images representing your project.

Subject matter (in order of preference):

- Exterior shot of your client's facility/property
- Interior shot of your client's facility/property
- RTEM Dashboard / Report Images
- Someone from your organization and/or your client's organization interacting with real-time energy management software
- Someone from your organization and/or your client's organization inspecting/maintaining equipment

Project Image Guidelines:

- Horizontally aligned
- File type: JPG
- Resolution: 300 dpi
- You must have permission to use this image and (using the attached release form) be able to grant NYSERDA permission to use this image

If you do not have an image or if the image you provide does not meet quality standards, a stock image will be used in its place.

Also, please provide your company's logo:

Logo Guidelines:

- Transparent background
- Include any style guidelines or use requirements
- File type: Vector/EPS (preferred), PNG, GIF or JPG
- Resolution (for non-vector files): 300 dpi

Questions?

If you have any questions about this information, please send an email to:

RTEM@nyserda.ny.gov