

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

RTEM Premium - Contract Addendum Expansion

This section of the Contract Addendum Guidelines is to be completed when applying for an RTEM Premium project. An RTEM Premium Contract Addendum will be identical to the RTEM Basic Contract Addendum through Sections 1-5 but will also require that the following Sections 6-8 be included in the submission. Provide as much detail as possible when working on these sections.

6. Enhanced Scope

6.1 Utility Metering

List **all site utilities**, the **specific devices** that will be used to perform metering and **describe the scope** of how they will be integrated into the overall system. Include the certification rating of the devices proposed (e.g. Class A device based on IEC61000-4-30)

6.2 Major Mechanical (RTEM Basic Scope)

List **all major, baseload mechanical** systems that will be connected to the RTEM system and what **type of points** will be monitored on each

6.3 Secondary Systems

List the **(2) secondary systems** that will be integrated and describe the **scope of coverage**, including what **types of points** will be monitored on each. Options include: Lighting (Indoor/Outdoor), Indoor Air Quality monitoring and control, and full integration of Occupancy sensing.

6.4 Ancillary Systems

List the **(1) ancillary system** that will be integrated and describe the **scope of coverage**, including what **types of points** will be monitored on each. Options include: Plug Loads, Terminal HVAC Systems, Elevators / Escalators, Security / Access Control, Building Weather Station, and Occupant Comfort / Convenience App

7. Customer Commitment

7.1 Letter of Intent

Provide a **customer signed** letter of intent stating that they are committed to the project, pending approval of the RTEM Premium application

8. Premium Timeline

8.1 Installation

List out all anticipated installation timelines with forecasted dates (Month/Year) for each system described in Section 6 explicitly

8.2 Commissioning

List any additional commissioning activities that must be performed for each system described in Sections 6 explicitly

Please include a signature block for both the customer and RTEM Vendor(s) to sign & date. After NYSERDA 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 NYSERDA review for continued Program participation