

Custom Project Steps	Description	Parties Involved	Customer Communication	Timeline
Project Identification & Design	Through an energy assessment, customer contact (outreach to the PAs or vice versa), mechanical, electrical, or RCx contractor contact, or other means, energy efficiency measures are identified as having the potential to provide energy savings. For more complex projects, such as hvac system upgrades or replacements, this may be in the design phase of a project or soon after.	Energy assessors, contractors, customers, PAs	Depends on how the projects are identified as to whether or not the PAs are involved in this step. Technical Assistance vendors (TAs) may or may not be involved at this step. Sometimes the TAs are not involved until after the project is identified. It is an open market and customers are welcome to choose whatever design engineer, implementation contractors, etc. they would like to determine energy savings measures or pursue installation/implementation of the measures.	N/A
Project Development	Customer and PA identifies measures for pursuit and the implementation contractors desired to accomplish the energy efficiency scope of work.	PA representative, Customer, Implementation Vendor(s) (for example, a mechanical design engineer, TAB contractor, and electrical and/or mechanical contractor)	After discussion about whether the project would be something potentially supported by the PA(s), the customer would like to proceed with the measures and has selected the following measures. The PAs would share that to determine the energy savings, a review of the project parameters (age of existing equipment, temperatures, pressures, site conditions, current energy usage, seasonality, etc.) will be needed. It is an open market and customers are welcome to choose whatever implementation contractors they would like to determine energy savings measures or pursue installation/implementation of the measures.	N/A
Application	Customer and implementation vendor sign the custom application once they choose to move forward to pursue incentives for energy savings measures	PA representative, Customer representative, Implementation Vendor	Customer is committing to engaging in work that involves energy savings. The PAs require energy savings calculations and a commitment from the customer to participate. In some cases a pre-installation site visit may be required to confirm existing conditions. There is also a commitment needed from the implementation vendor that they will follow program guidance and align their projects with what they are stating as the energy savings parameters (i.e. age of existing equipment, temperatures, pressures, site conditions, current energy usage, seasonality, etc.). The need for pre-installation visit(s) or data logging may impact the potential timeline for submitting the project or measures for technical review.	Average= 40 days Min= 1 day (custom express, LCTM, direct install) Max= >1,000 days (covid, no hospital access, no materials, CHP projects, customer investments, etc.)
Determine Energy Savings	Based on measure(s) entailed, the implementation vendor and/or the Technical Assistance (TA) study vendor derive the energy savings associated with each measure. The measure complexity and experience of the implementation vendor with the needed program savings calcs drives the need for TA vendor involvement. Deriving energy savings involves documenting the baseline and proposed energy savings parameters.	PA representative, Customer, Implementation Vendor (Technical Assistance vendor)	PAs need engineering calculations to understand the energy savings on which the incentives are based. If there is a customer or vendor who frequently works with the program and has savings calcs readily available that meet program expectations or there is a custom express calculator (like the Weatherization one) that can be used, this is a lesser level of effort. If the project involves the installation of something involved and complex, a TA study would be needed and depending on the measure, determination of energy savings will take longer. Technical Assistance vendors calculate the projected energy savings associated with the projects. If an implementation vendor or customer cannot provide the needed calculations for determining energy savings, TA vendors can be provided to do so. It is an open market and customers are welcome to choose whatever TA vendors they would like to determine energy savings measures or pursue installation/implementation of the measures. Typically, the more involved the project or energy savings measure, the longer the time needed for determining energy savings. Other factors that impact timelines include the project seasonality, the existing system data collection capabilities, customer site availability, equipment and material availability, and more ultimately determine the timeline to completing the energy savings projections.	
Energy Savings Review	Ensuring the energy savings calculations meet the format, rigor, and engineering accuracy associated with claiming the energy efficiency program savings. Involves parameters like hours of facility operation, equipment nameplate data, etc.	PA Technical representative, Implementation vendor, customer, (Technical Assistance (TA) vendor)	The three year plan states the program requirements for the PAs to claim energy savings. The technical team is reviewing the projects to understand that these projects meet the parameters of the program and will deliver the energy savings as projected in the energy savings calculations.	
Cost Effectiveness Review	Ensuring the energys savings and project costs are beneficial to the customer and the program. Includes understanding the material and labor and alignment with program requirements.	PA Technical representative, implementation vendor	This step is done following the completion of the energy savings calculations. Legislation requires that the sectors be cost effective (less than the cost of supply, also known as passing the benefit cost ratio test (BCR)) and the DPU has EE guidelines for the PAs to follow. As a result, the project energy savings, costs and additional environmental benefits are used to determine if the project is cost effective. If a project is determined eligible the PA will let the customer know the project is eligible, what the pre-approved incentive is, and the desired time for the customer to install for the project to remain eligible (typically within the year is expected). If a project does not pass the BCR, this would be communicated with the project team then guidance would be provided as to why the project did not pass the BCR.	

Implementation	Installing approved energy efficiency measure(s).	Implementation vendor, customer (PA contact informed)	The customer's desired implementation vendor will proceed with installing the energy efficiency measures aligning with the energy savings parameters outlined in the application. Concerns about materials, customer site access, etc. should be shared with the PAs at regular intervals to understand where the project is in process.	Average= 170 days Min= 1 day (LCTM, direct install) Max = > 2,000 days
Verification	Once the project installation is completed, the PAs or its representative will perform a post-installation "walkthrough" to confirm the installation has been completed and met the energy savings parameters. The PAs or TA vendor then review the energy savings parameters used in the calculations and compare to the installation parameters to confirm that the projected energy savings are accurate.	PA/TA vendor, customer, implementation vendor	The project has been fully installed and access to the site via the PA or TA vendor is needed to walk through or collect data on the project that has been installed. This "walkthrough" is for the purpose of understanding whether the project has met the energy savings parameters as outlined in the project scope. It is not a "walkthrough" to determine alignment with health and safety or code comparison. Delays involved in post inspections may include seasonality, deviations from the original scope that require revisitation of the approved savings calculations, customer site availability, and more. A customer could also opt to hire a third party commissioning agent for the purpose of a more thorough inspection and share the results of the commissioning with the PAs.	Average= 12 days Min= 1 day Max= > 500 days (savings values do not align with initial claims, seasonal operation, etc.)
Incentive	Incentive is released for payment	PA, customer/vendor (incentive payee)	The completed project has met the expectations set forth in the application and the incentive can be processed by the PAs.	Average = 5 days