

2020 Commercial Efficiency Program

Technical Assistance Partner Agreement Version 1.0



2019/2020 PSEG Long Island Technical Assistance Partner Agreement:

PSEG Long Island's Commercial Efficiency Program (CEP) Technical Assistance (TA) program provides rebates to customers who require engineering and design services in order to qualify for certain rebates or certifications. The purpose of the TA Program is to support the certifications and conditions stated on the 2019/2020 Technical Assistance Rebate Applications.

Rebates issued under the CEP TA Program will be paid directly to the customer, unless the TA firm has received an assignment letter (See website for the approved Assignment Letter template).

To qualify as an approved PSEG Long Island TA Program Partner (TAP), firms must meet eligibility criteria outlined in the TA Partner Agreement. TA Partner Agreements must then be signed by a duly authorized representative of the firm.

As a PSEG Long Island TA Program Partner, your company will be listed on PSEG Long Island's Commercial Efficiency Program website:

<https://www.psegliny.com/businessandcontractorservices/businessandcommercialsavings/businessandcommercialrebates>

Customers will be referred to this list of partners when considering a project where they are seeking a TA Program rebate. Customers can select their own firm from that list of partners. If the TA firm that the customer has chosen does not appear on that list, the customer's chosen TA firm must fill out the attached agreement in order to be considered for entry into this program.

Signed agreements with qualifications and resumes should be scanned and e-mailed to cepli@pseg.com.

All inquiries should be e-mailed to: cepli@pseg.com, with the subject heading "TA Program"

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0



2019/2020 PSEG Long Island Technical Assistance Partner Agreement:

The 2019/2020 PSEG Long Island Technical Assistance Partner (TAP) list is made up of qualified technical assistance firms that include skilled professionals such as architects, engineers and energy consultants that assist PSEG Long Island in meeting their energy savings and customer satisfaction goals.

To be approved as a PSEG Long Island Technical Assistance Partner (TAP):

- Complete and submit this PSEG Long Island TAP agreement application
- Provide at least three references confirming the requested years of experience in the discipline for which you are seeking to participate (LEED projects, ENERGY STAR benchmarking, feasibility studies [for energy efficient technologies]).
- Provide qualifications, reports and resumes that demonstrate minimum firm requirements, as well as detailed services that can be provided as a TAP.

As a PSEG Long Island TAP, you will receive the following benefits:

- Ability to participate in the CEP's TA Program
- Potential to broaden customer base and increase sales
- Company listing on PSEG Long Island CEP Website
- Recognition and reward programs for achievements

The TAP shall observe the following:

- The TAP shall accurately represent the relationship between the TAP and PSEG Long Island as follows - The TAP is an independent contractor and may be a participant in PSEG Long Island's CEP TA Program. Participating Firms shall not represent themselves as working for, approved by, or certified by PSEG Long Island.
- The TAP shall maintain all relevant licenses required by federal, state, county or municipal governments or any other agencies with jurisdiction over work performed under the CEP TA Program.
- The TAP shall provide customers with informational materials as required by the CEP TA Program.
- If a TAP becomes involved in a dispute with a customer over business practices, the TAP shall work with PSEG Long Island to resolve the dispute amicably. In any event, the TAP shall hold PSEG Long Island harmless from any suit arising from work performed under the CEP TA Program.
- The TAP must disclose whether any individual(s) including owners, principles, shareholders, associates and employees affiliated with the TAP have previously participated in, or are currently participating in, any of PSEG Long Island's programs including the PSEG Long Island CEP TA Program. If so, list any and all individuals on the Signature Page of this document. This is an ongoing requirement. As such, the participating firm shall notify PSEG Long Island immediately of any changes or updates to this information.

2020 Commercial Efficiency Program

Technical Assistance Partner Agreement Version 1.0



- The TAP acknowledges that participation in the CEP TA Program is a privilege, and that PSEG Long Island may suspend or terminate the approved TAP's participation in the CEP TA Program for any reason, including failure to maintain program standards. In all cases involving a TAP's participation status, PSEG Long Island's written decision is final.
- PSEG Long Island reserves the right to make changes to the CEP TA Program requirements. TAP's will receive firsthand notice of such changes.
- Notification may be by email and/or posting on <https://www.psegliny.com/businessandcontractorservices/businessandcommercialsavings/businessandcommercialrebates>

Firms may apply to be an approved TAP for any combination of the services listed below:

- *Energy Engineering Study¹*
- *Measurement & Verification (M&V)*
- *Energy Modeling*
- *Commissioning*
- *ENERGY STAR Benchmarking and Labeling*

¹ For firms utilizing Energy Modeling to support their Engineering Study, PSEG Long Island Approval for Energy Modeling is required.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

ENERGY ENGINEERING STUDY

Energy Engineering Study Firm Qualifications and Study Requirements

TA firms seeking to be listed as PSEG Long Island TAP for Energy Engineering Studies shall be capable of providing energy engineering with proven experience evaluating electric energy conservation measures/systems (such as measures applied to HVAC systems, lighting, motors, etc.). Firms may be required to utilize specialized energy analysis tools (i.e. end use metering and monitoring) as needed. Such experience should be reflected in sample studies. Energy Engineering Studies will be used, at PSEG Long Island's discretion, to support Custom Rebate applications.

Minimum Firm Qualifications:

1. Firms and/or Individuals performing the Energy Engineering Study must have a minimum of 3 years of experience as a key contributor on energy efficiency studies in the electric industry. Such studies must demonstrate electric energy and demand savings.
2. The TA Firm, or individuals employed by the firm that are performing the Engineering Study, must provide a current project list that contains 3 energy engineering studies demonstrating electric energy and demand savings within the last 5 years which utilize or reference ASHRAE Standard 90.1, NY State Code, or other industry standard:
 - a. PSEG Long Island TA Program Manager may request copies of such studies at their discretion. Such Energy Engineering Studies will assist the PSEG Long Island TA Program Manager with qualifying the TAP
3. Project Team must consist of a Licensed PE, Registered Architect or Certified Energy Manager or other acceptable certification as determined by PSEG Long Island. Resumes for all team members must be provided.
4. Firms utilizing sub-consultants to complete an Energy Engineering Study must choose only an approved TAP for such sub consultation work.
5. Firms must provide at least one example of an energy engineering study containing ENERGY STAR Benchmarking.
6. To be qualified to deliver an Energy Model, at least one study must include a qualifying Energy Model that meets minimum requirements of PSEG Long Island.

Minimum Requirements for PSEG Long Island Energy Engineering Study:

1. The scope of work must contain at least one Energy Conservation Measure (ECM) that qualify, or for which the TAP is attempting to have considered, under CEP.
2. Must demonstrate electric energy and/or demand savings.
3. Building must be ENERGY STAR benchmarked rated as part of the study (portfolio manager must be complete) for existing buildings.
4. Energy Engineering Studies must use generally accepted engineering algorithms, commercially available software, or building simulations such as eQuest or other industry standard as approved by PSEG Long Island TA Program Manager.
5. Where appropriate or as directed by PSEG Long Island, Energy Engineering Studies should contain reference to the Energy Policy Act of 2005, its interaction with the ECM to be studied and associated eligible tax deductions.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

6. The Energy Engineering Study must be conducted by a Licensed PE, Registered Architect or Certified Energy Manager or other acceptable certification as determined by PSEG Long Island.
7. The Energy Engineering Study must include incremental costs between “standard design” and the “proposed energy-efficient design” for the ECM studied.

Measurement & Verification (M&V) Study

Measurement & Verification Firm Qualifications and Study Requirements

Minimum Firm Qualifications:

1. Firm and/or individuals performing the M&V study must have a minimum 3 years of M&V experience with at least one completed project resulting in 1,700 MMBtu (or 500,000 kWh) savings.
2. Firm must provide a current project list that contains 3 M&V studies that demonstrate electric energy savings, demand savings and/or MMBtu savings within the last 5 years which follows International Performance and Verification Protocol (IPMVP); TA Program Manager may request copies of studies.
3. Project team must include a Certified Measurement & Verification Professional (CMVP) and one of the following: Licensed PE, Registered Architect or Certified Energy Manager; resumes for all team members must be provided.

Minimum Requirements for PSEG Long Island Measurement & Verification Study:

1. The M&V study must include an M&V Plan per IPMVP protocol. The following are some of the details required within the plan:
 - a. The M&V Plan defines how savings will be calculated and details for each ECM
 - b. Overview of proposed energy and cost savings
 - c. Schedule for all M&V activities
 - d. Details of all assumptions, baseline conditions and data collected
2. A final M&V Report must be developed per IPMVP protocol.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

ENERGY MODELING

Energy Modeling Firm Qualifications and Study Requirements

TA firms seeking to be listed as PSEG Long Island TAP for Energy Modeling (Mx) must demonstrate experience in energy modeling specifically related to electric energy savings measures. Energy models will be used, at PSEG Long Island's discretion, to support Custom Rebate applications.

Minimum Firm Qualifications

1. Firms or individuals must have demonstrated 3 years' experience as an energy modeler.
2. The TA Firm, or individuals employed by the firm that are performing the Energy Model, must provide a list of their 5 most recent energy models, which should be no older than 3 years.
 - a. PSEG Long Island TA Program Manager may request copies of such Energy Models at their discretion. Such Energy Models will assist the PSEG Long Island TA Program Manager with qualifying the TAP
3. Project Team must consist of a Licensed PE, Registered Architect or Certified Energy Manager or other acceptable certification as determined by PSEG Long Island. Resumes for all team members must be provided.
4. Firms utilizing sub-consultants to complete PSEG Long Island Energy Modeling must choose only an approved TAP for such sub consultation work.
5. The Energy Model may be used to support PSEG Long Island Whole Building rebates. TA Firms should utilize industry recognized commercially available software for building simulation to perform the Energy Modeling. From such models, the firms must be able to provide reports containing detailed, comprehensive results of the whole building analysis.
6. TA Firms must demonstrate experience utilizing ASHRAE Standard 90.1, NY State Code, or other industry standard and associated revisions/appendices related to energy modeling methods.

Requirements for a PSEG Long Island Energy Model

1. Models must use computer simulations that contain hourly analysis programs (such as DOE 2, Trane Trace, eQuest, or industry recognized equivalent).
2. Energy model baselines must meet New York State Code in effect at the time of TA application approval.
3. Models must measure electric energy and demand savings.
4. LEED projects must also meet the USGBC LEED Green Building Program requirements specific for the certification sought for the project.
5. The scope of work must contain at least one ECM either for consideration of or that qualifies under CEP. TA firms can work with a PSEG Long Island representative to determine qualification.
6. The Energy Model may be used to support PSEG Long Island Whole Building rebates.
7. Where appropriate or as directed by PSEG Long Island, Energy Modeling reports should contain reference to the Energy Policy Act of 2005, its interaction with the ECM to be studied and associated eligible tax deductions.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

COMMISSIONING

Commissioning Firm Qualifications and Study Requirements

TA firms seeking to be listed as PSEG Long Island TAP for Commissioning (Cx) shall demonstrate that they have personnel with direct commissioning experience. The qualified TA firm should be a member of the Building Commissioning Association [BCA] or other industry recognized building commissioning organization as deemed appropriate by PSEG Long Island.

Minimum Firm Qualifications

The PSEG Long Island TAP firm designated as the Commissioning Authority (CxA) to lead, review and oversee the commissioning process activities shall have the following qualifications:

1. Firms or individuals shall have a minimum of 3 years of documented experience specializing in providing building commissioning in PSEG Long Island's service territory and the surrounding area [e.g., New York State].
2. Project Team must consist of a Licensed PE, Registered Architect or Certified Energy Manager or other acceptable certification as determined by PSEG Long Island. Resumes for all team members must be provided.
3. At least one team member working on Commissioning projects shall be certified by the Building Commissioning Association (BCA) or other industry recognized building commissioning organization/course as deemed appropriate by PSEG Long Island.
4. The TA Firm, or individuals employed by the firm that are performing the building commissioning, must provide a list of their 2 most recent commissioning projects. Such projects must be no more than 3 years old.
 - a. PSEG Long Island TA Program Manager may request copies of such Commissioning Reports at their discretion. Such Commissioning Reports will assist the PSEG Long Island TA Program Manager with qualifying the TAP

Requirements for a PSEG Long Island Building Commissioning

1. Commissioning shall be performed in accordance with any or all applicable standards, guidelines and best practices including:
 - a. the USGBC's pre-requisites and credits for LEED certification requirements such as Fundamental and Enhanced commissioning as defined by the USGBC LEED Rating systems,
 - b. ASHRAE Guideline 0 – The Commissioning Process, and/or
 - c. Those identified by the BCA
 - d. Others as deemed appropriate by PSEG Long Island
2. Customers may be eligible for, or PSEG Long Island may request any combination of the following types of Commissioning rebates:
 - a. LEED Commissioning
 - i. PSEG Long Island TAP must provide the customer, PSEG Long Island, and the USGBC with the required documentation for indicating compliance with pre-requisites and credits associated with commissioning which must be outlined in the scope of work.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

COMMISSIONING

- b. PSEG Long Island Level 1: Limited complexity. For example, Commissioning of a particular piece of equipment qualifying for standardized, predefined CEP rebates (such as a rooftop AHU, new chiller or VFDs)
 - c. PSEG Long Island Level 2: Moderate complexity. For example, Commissioning a system qualifying for customized CEP rebates (such as a chiller plant or a new DDC control system, lighting control system)
 - d. PSEG Long Island Level 3: Complex: For example, Commissioning of multiple systems (such as Whole Building commissioning)
3. Draft Commissioning reports must include an estimate of electric demand and energy savings associated with the commissioning effort above and beyond the savings achieved from the installation of high performance equipment.
4. Draft and Final Commissioning Reports must meet the Eligibility Requirements outlined on the CEP Technical Assistance Application in the section referencing Application Type "LEED Certification and Points"
5. PSEG Long Island TAP firms shall develop checklists for commissioning of each piece of equipment or system and witness/perform the necessary pre-functional and functional performance tests as outlined in the commissioning plan.
6. PSEG Long Island TAP firms shall perform site visits, as necessary, to observe component and system installations, issue deficiency notices, and keep an issues log relate to the commissioning tasks.
7. Final Commissioning reports must be submitted after completion. TA firms must develop such comprehensive reports detailing the results of the commissioning process.

2020 Commercial Efficiency Program

Technical Assistance Program Partner Agreement Version 1.0

ENERGY STAR Benchmarking

ENERGY STAR Benchmarking Firm Qualifications and Study Requirements

TA firms seeking to be listed as PSEG Long Island TAP for Energy Modeling (Mx) must demonstrate experience in ENERGY STAR Benchmarking and the use of ENERGY STAR Portfolio Manager. ENERGY STAR Benchmarking must be completed by a Licensed Professional (PE or Registered Architect) as outlined in the Licensed Professional's Guide to the ENERGY STAR Label for Commercial Buildings. The PSEG Long Island TAP may be required to demonstrate energy savings from past projects regardless of whether or not they were rebated under the CEP.

Minimum Firm Qualifications

1. Firms and/or Individuals performing the ENERGY STAR Benchmarking must have demonstrated a minimum of 2 years of experience in ENERGY STAR building labeling
2. The TA Firm, or individuals employed by the firm that are performing the ENERGY STAR benchmarking, must be an ENERGY STAR Partner for Commercial and Industrial Service or Product Provider OR provide a current project list that contains any 2 of the following:
 - a. ENERGY STAR benchmarking for certified ENERGY STAR labeled buildings
 - b. Recent Energy Models that meet PSEG Long Island requirements for Energy Modeling
 - c. Recent Commissioning report that meets PSEG Long Island's requirements for Commissioning
 - d. Recent Energy Study as approved by PSEG Long IslandPSEG Long Island TA Program Manager may request ENERGY STAR project identification numbers OR copies of studies at their discretion. Such information will assist the PSEG Long Island TA Program Manager with qualifying the TAP.
3. Project Team must consist of a Licensed PE, Registered Architect or other acceptable certification as determined by ENERGY STAR. Resumes for all team members must be provided.

Requirements for PSEG Long Island ENERGY STAR Benchmarking

1. Benchmarking must be conducted in accordance with the ENERGY STAR Label for Commercial Buildings.
2. All ENERGY STAR projects shall be accompanied by an energy study which must identify energy savings opportunities that may be further implemented by the customer at the building seeking labeling.
3. Study must identify electric energy and demand savings.
 - a. If there are limited or no opportunities for electric savings, the study must indicate specific improvements that were made within the last 2 years

PSEG Long Island Technical Assistance Partner (TAP) Coversheet

Applicant Information				
Company Name				
Contact	Title	Email		
Mailing Address	City	State	Zip	
Office	Cell	Fax		
Website				
Yrs in Business	Yrs Under Current Ownership	Number of Employees		
<input type="checkbox"/> Minority Owned Business		<input type="checkbox"/> Woman Owned Business		<input type="checkbox"/> Veteran Owned Business
Federal Tax Id	Corporation <input type="checkbox"/>	Partnership <input type="checkbox"/>	Individual/Sole Proprietor <input type="checkbox"/>	Exempt (Tax exempt/non-profit) <input type="checkbox"/>
How did you hear about the Program?				

Company Contacts			
Name	Email Address	Phone	Position

Insurance Information			
Company			
Mailing Address	City	State	Zip
Contact Name	Phone	Type of Coverage	Coverage \$

PSEG Long Island Technical Assistance Partner (TAP) Coversheet

Company Information			
Business Type			
Architect <input type="checkbox"/>	Consultant <input type="checkbox"/>	Engineer <input type="checkbox"/>	Other (Please Specify) <input type="checkbox"/>
PSEG Long Island TAP Listing Sought (check all that apply)			
ENERGY STAR Benchmarking <input type="checkbox"/>	Energy Engineering Studies <input type="checkbox"/>	LEED <input type="checkbox"/>	
Energy Modeling <input type="checkbox"/>	Commissioning <input type="checkbox"/>	Other <input type="checkbox"/>	

Licenses and Certifications			
Please list all applicable licenses and certifications held by your company			
TYPE	NUMBER	ISSUING AUTHORITY	DATE

Customer References		
1	Company	Describe
	Contact	
	Phone	
2	Company	Describe
	Contact	
	Phone	
3	Company	Describe
	Contact	
	Phone	

Agreement and Signature		
<p>By submission of this application, the applicant and person signing on behalf of any applicant subscribes and affirms, under penalties of law that the statements made in this application for inclusion to the PSEG Long Island Technical Assistance Partner Agreement have been examined and to the best of his/her knowledge and belief are true and correct. The applicant affirms that no person named in this application is subject to disqualification under the terms and guidelines of New York State unless herein stated. The applicant understands that by signing this application it consents to any other inquiry to verify or confirm the information given herein. The applicant understands that this application for inclusion on the PSEG Long Island Efficiency Partner list does not guarantee that inclusion will be granted but will be used in the determination of eligibility for inclusion.</p>		
Authorized Representative (please print)	Title	Date

Submit Complete Applications to:
cepli@pseg.com Commercial Efficiency Program – Participating Technical Assistance Application