

# NEW CONSTRUCTION & MAJOR RENOVATIONS (10/22/2020)

## Memorandum of Understanding for Path 3: Whole Building Streamlined Path

The Whole Building Streamlined Path (“Program”) is provided by The Connecticut Light and Power Company (CL&P) and/or Yankee Gas Services Company (Yankee Gas) each dba Eversource Energy (Eversource) and The United Illuminating Company (UI), The Southern Connecticut Gas Company (SCG), and Connecticut Natural Gas Corporation (CNG), subsidiaries of AVANGRID, Inc. (collectively The Companies) as a comprehensive new construction offering for buildings more than 20,000 sf when The Companies are engaged early in the project’s design process. The purpose of the Program is to reduce building electrical and thermal energy demand and consumption by implementing cost-effective design alternatives early, before the end of design development, when changes are still feasible.

### Project Eligibility

1. Customer should engage The Companies before the end of design development.
2. Projects must be new buildings, building additions, or complete renovations of existing buildings. Qualifying major renovations are such that occupancy is not possible during construction and where the project scope includes at least 3 of the following systems: (1) HVAC, (2) DHW, (3) lighting, and (4) envelope
3. Participants must be a customer of one of The Companies.

### Key Customer Commitments

1. Engage The Companies between pre-schematic design and the completion of the projects design development phase
2. Work collaboratively with each other and with Energize CT-authorized technical assistance (TA) vendor to maximize energy savings
3. Participate in an energy efficiency charrette before the end of design development
4. Provide design drawings through 90% Construction Documents

### Key Commitments of The Companies

1. Assign a pre-qualified technical assistance TA vendor to lead an Energy Charrette and provide technical assistance throughout design (TA vendor participation in charrette and all design assistance is funded 100% by The Companies)
2. Provide energy analysis to determine savings and incentives
3. Assist customer in making informed decisions about including energy conservation strategies in the project
4. Pay customers an incentive for each energy conservation measure (ECM) that is included in the project and a multi-end use incentive to qualifying projects (see summary of incentives in Table 1 that follows)
5. Offer Design Team Incentives to qualifying projects (see summary of incentives in Table 1 that follows).

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This document outlines the roles and responsibilities of each party to set transparent expectations for all parties participating in the Program. Under no circumstances does this Memorandum require customers or design teams to incorporate any particular energy conservation measure or group of measures into a project. Building designs proceed at the direction of customers and their design teams. Further, this Memorandum does not bind the Companies to any particular energy conservation measure and/or any Incentive and any and all assistance offered by The Companies through this Program is offered in an advisory capacity only.

The Companies understand that the following customer:

\_\_\_\_\_ (“the Customer”):

Will undertake the following (check one)

- new construction
- major renovation
- addition

\_\_\_\_\_ (“Premises Address”)

This project is being designed by the following design professionals (collectively, the “Design Team”):

\_\_\_\_\_ (“Architect” or “Design Firm Official”)

\_\_\_\_\_ (“Electrical Engineer”)

\_\_\_\_\_ (“Mechanical Engineer”)

Participating Companies:

\_\_\_\_\_ (“Electric Utility Provider”)

\_\_\_\_\_ (“Gas Utility Provider”)

### IMPORTANT:

**Customers participating in this pathway may not also participate in the Energize CT upstream programs where incentives for HVAC, domestic hot water and lighting equipment are offered directly to distributors or receive any post-installation incentives. To ensure participation in only one Energize CT program pathway, designers must include language in project documents informing contractors that this project is participating in a Energize CT downstream program pathway, and that they may not pursue or accept any HVAC, domestic hot water or lighting upstream or post-installation incentives for this project.**

### Detailed Process:

#### Step 1—Coordination with The Companies

During schematic design or in pre schematic design, inform The Companies of your new construction project to see if the Whole Building Streamlined Path is a good fit. The Whole Building Streamlined Path is only available when The Companies are engaged early in design and an Energy Charrette (see Step 2) can be scheduled during schematic design or design development. The earlier you contact The Companies, the better the opportunity for energy savings and incentives. Following your initial conversation with The Companies, they will identify a TA vendor who will provide design support and technical assistance to the project team at no cost to the customer, starting with an Energy Charrette.

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## Step 2—Energy Charrette

During the schematic design or design development phase of the project, the Energize CT-authorized TA vendor will lead an Energy Charrette with the project's design team. The customer, the architect or design firm official, the MEP (Mechanical, Electrical and Plumbing) Engineers, the lighting designer (if there is one), the commissioning agent (if there is one) and the general contractor (if selected) together with The Companies should participate in this brainstorming session intended to identify, discuss/analyze and compare potential building ECMs. The charrette, which can be part of a larger green building/LEED charrette, or a separate meeting, should be long enough to enable a full discussion of each energy system in the building and a wide range of energy conservation measures for each of these systems (2 hours is usually sufficient).

In advance of the Energy Charrette, the customer shall provide The Companies with any existing project drawings and design narratives.

The outcome of Energy Charrette shall be a report that identifies the ECMs that the team agreed to pursue further, and ideally include in the building design.

## Step 3 – Interim Report and Consultation

After the charrette, the TA vendor will be available as needed to answer questions and otherwise consult with the design team on the best way to include the efficiency measures discussed in the charrette into the design.

The TA vendor will conduct a mid-design review based on the 50% or 100% design development set, depending on the project, to assess progress on incorporating the strategies agreed upon during the charrette into the design, and at this time will provide feedback on additional changes to the design that will result in further energy savings. The TA vendor will issue a report to The Companies and the customer based on this mid-design review.

## Step 4 – Energy Analysis

The TA vendor will review design drawings to assess the ECMs identified in the project and recommend additional ECMs for consideration. The TA vendor will calculate the potential energy savings and incentive amounts of the ECMs using incremental construction cost and comparing the energy savings against the Energize CT program baseline.

## Step 5 – Incentive Pre-Approval from The Companies

The TA vendor will prepare the draft final savings calculations and report for The Companies to review based on the 90% Construction Documents (CD) set. The TA vendor will prepare these draft final documents for The Companies' review within 4 weeks of receipt of the 90% Construction documents set.

The Companies will review the draft final savings calculations and report and may issue comments to the TA vendor for incorporation. The Companies will then request the final calculations and report from the TA vendor. A Letter of Agreement (LOA), which describes in detail the ECMs that are contributing to the project's energy savings, will accompany the final calculations and report. The customer must review and sign the LOA to receive an incentive.

Custom measure incentives are capped at 95% of the incremental cost of the ECMs included in the project.

Incentive levels for each measure are determined by The Companies based on predicted annual energy savings. Note that some measures supported in this Program may be "custom" measures where energy savings are calculated on a project-by-project basis (see below for incentive rates).

Select projects are subject to 20% hold-back pending receipt of trend data or other information stipulated in the LOA that The Companies will prepare and provide for customers.

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| Table 1 - Summary of Customer Incentives |   |   |  |
|--|---|---|--|
| Incentive                                | Energy Conservation Measure (ECM) Examples  | Rate  |  |
| Prescriptive Incentives                  | Building Envelope   | See the data collection on EnergizeCT.com for latest rates                                |  |
|  | Unitary HVAC (RTU, AC, HP, VRF)   |   |  |
|  | Lighting & Networked Lighting Controls  |   |  |
|  | Energy Recovery   |   |  |
|  | Demand Control Ventilation  |   |  |
|  | High Efficiency Chillers  |   |  |
|  | DHW Heaters   |   |  |
|  | Condensing Boilers  |   |  |
| Custom Incentive                         |   | \$0.40/kWh or \$1,000/summer peak kWh and/or \$6.00/ccf capped at 95% of incremental cost |  |
| Multi-End Use                            | Project must include a minimum of 3 end uses.<br>End use is defined as Gas or Electric, impacting Heating; Cooling; Lighting; Process; Domestic Water Heating; Refrigeration; Motors and Drives | Calculated at \$0.10 / kWh and/or \$1.00 / ccf (capped at \$20,000)                       |  |

| Table 2 - Design Team Incentives  |  |
|---|--|
| Calculated at \$0.07 kWh or \$0.34/ccf (as applicable) and capped at \$10,000 |  |

Step 6 — Construction Completion, Construction Phase Incentive Payment, Design Team Incentive Payment

The customer and design team must keep the list of final ECMs in mind during construction administration so that ECMs for which incentives are being offered are not substituted or removed during construction.

A few weeks before substantial completion, The Companies may request a set of the approved submittals, invoices and photographs associated with all of the ECMs being supported with incentives, including controls submittals. The Companies may also request a copy of the project’s payments.

All projects participating in the Program are subject to inspection by each participating company.

Upon The Companies’ review of submittals and invoice documents, and upon completion of the post inspection, The Companies will provide the incentive payment to the customer and will provide 100% design team incentive payment. Design team incentives are paid to the design team lead, which may disperse to other team members as appropriate.

Select projects are subject to 20% incentive hold-back pending receipt of trend data or other information stipulated in the LOA.

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By signing below, the owner represents that he/she (1) shall be the sole and lawful owner of the Premises and (2) has read, understands, accepts and agrees to the terms and conditions for participation in the Program outlined above.

**Customer Signature:** \_\_\_\_\_

**Customer Printed Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Design Firm Official Signature:** \_\_\_\_\_

**Design Firm Official Printed Name and Company Affiliation:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**AGREED:**

\_\_\_\_\_ **Date:** \_\_\_\_\_

**The Companies (specific Utility and its representative to be identified)**

\_\_\_\_\_ **Date:** \_\_\_\_\_

**The Companies (specific Utility and its representative to be identified)**

THIS DOCUMENT MUST BE SIGNED BEFORE ENGINEERING SERVICES APPLICATION CAN BE REVIEWED

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# Process Checklist

## Whole Building EUI Reduction Program

### Pre-Design Phase

- Engage The Companies early about the project
- Incorporate commitment to work with The Companies and to achieve or exceed program energy goals in the request for proposal (RFP) and Owners Project Requirements (OPR) documents

### Schematic Design and Design Development Phases

- Sign a Memorandum of Understanding (MOU)
- Provide early design drawings/narratives
- Participate in brainstorming charrette
- Confirm the list of Energy Conservation Measures (ECM) included in project
- Provide 100% Design Development (DD) drawings for Mid-Design Review Report
- Review/discuss the Mid-Design Review Report provided at 100% DD

### Construction Document Phase

- Provide following language to the purchasing agent: **“This project will be receiving incentives through an Energize CT energy efficiency program directly. Equipment Distributors: Please Do Not include an upstream program incentive in the bid response, as this project can’t be reported through the Commercial Upstream Program.”**
- Provide 50% Construction Documents (CD) and discuss and value engineering changes
- Provide 90%/100% CD for final report
- Review/discuss the Final Report including ECM, energy savings and incentives at 90% or 100% CD
- Sign the LOA

### Construction Phase

- Keep the final ECMs in mind during construction

### Post Construction Phase

- The Companies may request submittals, photographs, invoices and possibility schedule of values to support the ECMs
- A post inspection may be scheduled to validate equipment installation and operation
- Sign the post-inspection measure verification forms
- Customer incentives will be paid upon ECM validation
- Design team incentives will be paid upon ECM validation

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