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# Local Government Energy Audit Program Guidelines & Application Forms

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The **New Jersey Board of Public Utilities (BPU)** has authorized an incentive program to subsidize a portion of the cost to New Jersey's local governmental agencies for completing an energy audit of their eligible facilities. The energy audit must be provided by a prequalified energy Auditing Firm (See Appendix A). Participants in the **Local Government Energy Audit Program (the Program)** are also eligible for incentives toward the cost of implementing specific energy improvements recommended in the energy audit. These incentives are part of the suite of New Jersey's Clean Energy Program offerings to the Commercial & Industrial market sector.

The Program is restricted to public buildings owned by local government agencies: municipal and county governments, local and regional authorities, boards of educations, and county colleges (see the Glossary for a full description). Public buildings must be owned by the government agency, and include but are not limited to: offices, police and fire facilities schools, public works and transportation facilities, utility plants, libraries, and recreation/senior /community centers.

This document is an all-inclusive package of program guidelines and application forms. Applications are accepted on a first-come, first-serve basis, subject to funding availability except as noted in Section II.C below. Please send all applications to:

**New Jersey's Clean Energy Program  
c/o TRC Energy Services  
900 Route 9 North, Suite 104  
Woodbridge, NJ 07095**

All questions can be directed to **Roger Kliemisch at 866-657-6278 x4 or rkliemisch@trcsolutions.com.**

For additional general information, please visit [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb).



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## I. INTRODUCTION

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The New Jersey Board of Public Utilities (BPU) has authorized an incentive program to subsidize the cost to local governmental agencies for having an energy audit of their facilities performed through one of the prequalified Auditing Firms. The **Local Government Energy Audit Program (The Program)** provides an incentive that reduces the cost of the energy audit. The Program is managed by the New Jersey BPU's Commercial/Industrial Market Manager, TRC Energy Services (the Market Manager). All questions regarding the Program or any other Commercial/Industrial market sector programs should be directed to TRC staff at 866-657-6278.

The New Jersey Board of Public Utilities Office of Clean Energy (the Administrator) reserves the right to extend, modify, or terminate this Program without notice. Modifications may include, but not be limited to, program incentive level changes

### A. OBJECTIVES

**The following are the objectives of the Program:**

- Encourage local government building owners to proceed with the cost effective recommended energy efficiency upgrades provided in the energy audits
- Reduce the initial cost of energy audits for local government buildings in the state of New Jersey.
- Help local governments reduce their energy costs and lower the local tax burden
- Support the local governments in further reducing their carbon footprints

### B. ELIGIBILITY

In order to participate, the applicant's proposed site(s) must be located within the service territory of at least one of New Jersey's regulated electric and/or gas utilities and be a contributor to the Societal Benefits Charge fund. These regulated utilities are:

1. Atlantic City Electric
2. Jersey Central Power & Light
3. New Jersey Natural Gas
4. Elizabethtown Gas
5. Public Service Electric and Gas
6. Rockland Electric Company
7. South Jersey Gas



The Program is restricted to public buildings owned by local government agencies . They include but are not be limited to: government offices, fire and police facilities, schools, public works and transportation garages, utility plants, libraries, and recreation, senior and community centers.

The definition of an eligible “local government agency” is included in the Glossary below. However, if you have any questions regarding eligibility, please contact the Market Manager for further details.

## II. PROGRAM DESCRIPTION

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### A. OVERVIEW

The Program will reduce the cost of energy audits and encourage energy efficiency upgrades for local government buildings in the following ways:

- Provide guidance to the local government agency as they develop a Scope of Work
- Facilitate Energy Auditing Firm qualification process
- Ensure that Energy Audit Reports meet Program requirements
- Provide an incentive of 75% of the cost for an Energy Audit Report
- Provide the balance (25%) of the Energy Audit Report cost if the applicant implements a specified level of recommended energy audit upgrade(s)

Applicants are not required to use their own competitive process to hire an Energy Auditing Firm. Applicants must use the New Jersey Division of Purchase and Property State Contract (T-2545) under the State Cooperative Purchasing Program. This contract has pre-selected qualified firms to perform the energy audits for this program. Since the firms were competitively selected through a Purchase and Property RFP process, they are already familiar with the rules and regulations of the Program. Furthermore, the prequalified Energy Auditing Firms are obligated to provide a minimum scope of services under the contract. For a list of these prequalified Energy Auditing Firms, see Appendix A. Applicants will send a Scope of Work and a request for price quote to each of the prequalified energy auditing firms and select an energy auditor from among responding firms in accordance with the State Contract (Section 1.2.1). Any agency using any reasonable, non-exclusionary, and non-discriminatory selection factors in addition to price must clearly identify them in their request for quotation. Any energy auditing firm declining to respond must do so in writing. For further information on the selected firms, go to <http://www.state.nj.us/treasury/purchase/noa/contracts/t2545.shtml>.

Applicants will select and interact directly with one of the pre-selected Energy Auditing Firms to determine the scope and cost of the energy audit. The Program will subsidize 75% of the cost for all approved energy audits. The remaining 25% of the energy audit cost will be refunded only if the net investment of installed recommended energy efficiency measures meets or exceeds the remaining energy audit cost. (Net Investment = Material and Labor Cost less NJ Clean Energy Program Incentive) The following examples outline the incentive payment process.



### **Example A**

Local government agency has ten buildings.

The eligible annual funding cap is \$100,000 for the group of buildings under the Program.

The cost of the energy audit for one of the buildings is \$10,000.

The Program will incentivize 75% of the energy audit cost or \$7,500. This incentive is for the energy audit and is not tied into any further actions on behalf of the local government.

The local government decides to move ahead with \$ 4,000 worth of the recommended energy efficiency measures within one year of the energy audit. Some of those energy audit measures qualify for New Jersey Clean Energy Program incentives of \$1,000.

The net investment by the local government is \$3,000 (\$4,000 total cost - \$1,000 incentives).

The net investment exceeds the remaining cost of the energy audit (\$3,000 is larger than the remaining \$2,500).

The local government qualifies for the second incentive of \$2,500.

### **Example B**

The county has five buildings.

The eligible annual funding cap is \$100,000 for the group of buildings under the Program.

The cost of the energy audit for one of the buildings is \$8,000.

The Program will incentivize 75% of the energy audit cost or \$6,000. This incentive is for the energy audit and is not tied to any further actions on behalf of the county.

The county decides to move ahead with \$ 3,000 worth of the recommended energy efficiency measures within one year of the energy audit. Some of those energy audit measures also qualify for New Jersey Clean Energy Program incentives of \$2,000.

The net investment by the county is \$1,000 (\$3,000 total cost - \$2,000 incentives).

The net investment does not exceed the remaining cost of the energy audit (\$1,000 is less than the remaining \$2,000)

The county does not qualify for any further incentive



For more information on the Program incentives, see Section III below.

## B. REQUIREMENTS

- Applicants need to formally apply to the Market Manager prior to contracting for the Energy Audit through one of the prequalified Energy Auditing Firms.
- Applicants to the Program must be an eligible local government agency (see Section VII Glossary for more details or call the Market Manager). Only buildings located within the state of New Jersey, served by a New Jersey regulated electric or gas utility are eligible for this program.
- To be eligible to receive Program incentives, applicants must use one of the pre-selected Energy Auditing Firms to perform their energy audit (see Appendix A, List of Pre-Selected Energy Auditing Firms or <http://www.state.nj.us/treasury/purchase/boa/contracts/t2545.shtml> for a listing). Applicants will select a firm using an Evaluation Committee in accordance with the process noted in Section II.A above. Applications for energy auditing services conducted prior to the Program implementation date and/or using other Energy Auditing Firms not listed in Appendix A will not be considered.
- The governing body of the local government agency submitting the application has passed a resolution enabling submittal of an application under the Local Government Energy Audit Program.

## C. PRIORITIZATION

The program is designed to be a first-come, first-serve program in terms of the budget, which means applications that are reviewed and complete and acceptable will be funded on a rolling basis while designated funds last. However, if there are more applications seeking funds than there are remaining funds, the following criteria will be used to prioritize the applications;

- a. The local government agency (if a municipality) is a member of the New Jersey League of Municipalities Mayors' Committee for a Green Future, has Registered with the Green Future Roadmap, and the governing body of the local government agency has passed a resolution stating their intent to seek “certification” according to the Green Future Roadmap Registration Procedures.
- b. The agency has an existing, or under-development, sustainable community plan;



- c. The agency's Governing Body has passed a resolution stating its commitment to becoming a sustainable community, including specific greening priorities;
- d. The agency is participating in the NJBPU's Clean Power Community Partners Program or Clean Power Choice Program; and/or
- e. The agency is actively participating in a state, national or other organization supporting sustainable community creation, energy efficiency, greenhouse gas reduction, sustainable/green design, and/or high performance buildings.

### III. PROGRAM INCENTIVES

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#### A. INCENTIVES

For those who have applied, there are two levels of incentives available through the Program. Seventy-five percent (75%) of the energy audit cost will be paid to all qualified participants upon receipt, review, and approval of the Energy Audit Report by the Market Manager. The remaining 25% of the energy audit cost may be paid if the building implements sufficient energy efficiency upgrades recommended in the energy audit. The net cost (total of material and installation cost less any NJ Clean Energy Program Smart Start Incentive received) of the upgrades must be equal to or greater than the remaining energy audit cost. Please see Section II.A above for examples of how this works.

#### B. LIMITATIONS

There is a \$100,000 incentive cap per year on the eligible energy audit costs for each local government agency in order to ensure that as many different agencies as possible are able to have the opportunity to participate. Local government agencies can participate each year that the program is offered in order to receive energy audits on all of their eligible facilities. The Program will not provide incentives to have the same building audited more than once.

Funds are awarded on a first-come, first-serve and case-by-case basis, with the exception noted above. The Program reserves the right to withhold funds until all Program requirements are met. If the energy audit is not performed within 6 months of the application approval, the Program reserves the right to discontinue the reservation of all incentive funds for the project. Similarly, if a sufficient quantity of recommended energy efficiency upgrades is not installed within 12 months of energy audit approval, the second portion of the incentive amount may no longer be available. Extensions may be granted on a case-by-case basis.



## IV. PROJECT IMPLEMENTATION PROCESS

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### **Step 1: Contact the Program for Guidance in Creating your Scope of Work**

To see if the Program is right for your local government agency, first contact the Market Manager at 866-NJSMART (866-657-6278). Program staff will review eligibility requirements and facility(s) needs with you. At this point in time, you will complete the Application (Part A). Program staff will provide guidance in developing a preliminary Scope of Work. For more information on creating the Scope of Work, see Appendix D, Scope of Work Recommendations. At the end Step 1, you will be ready to contact the prequalified Energy Auditing Firms.

### **Step 2: Contact Energy Auditing Firm(s)**

Once a preliminary Scope of Work is developed, the local government agency will solicit building-by-building proposals from the Pre-Selected Energy Auditing Firms in Appendix A in accordance with the State Contract requirements as discussed in Section II.A above. Energy Auditing Firms will provide the local government agency with a firm fixed price quote in accordance with their State Contract terms. Go to <http://www.state.nj.us/treasury/purchase/noa/contracts/t2545.shtml> for more information on the contract details.

### **Step 3: Select Energy Auditing Firm**

Program staff can provide support regarding the selection of an Energy Auditing Firm. Once the Energy Auditing Firm has been selected, the local government agency will work with the selected Firm to finalize the Scope of Work.

### **Step 4: Submit Required Forms**

The local government agency will submit a completed Application (Part B), Facility Data Form(s), Scope of Work and Cost Proposal to the Program. The Application Form (Part B) and Facility Data Form can be found in Appendices B and C. A resolution from the local government agency's governing body must be included with the Application.

### **Step 5: Receive Application Approval Notice**

Program staff will review the Application, Facility Data Form(s), Scope of Work and Cost Proposal. If Program staff has any questions, they will contact the local government agency for clarification. Once the application is approved, the applicant will receive an Application Approval Notice, which will be valid for 6 months.

### **Step 6: Energy Audit Firm Performs the Energy Audit**

The local government agency will contract directly with the selected Energy Auditing Firm to perform the energy audit(s). Applicants have 6 months from the approval date to complete the energy audit(s).

### **Step 7: Submit Energy Audit Report & Energy Audit Incentive Request Form**

The Energy Auditing Firm will prepare and submit to the applicant a final Energy Audit Report. The applicant will forward this report, along with an Energy Audit Incentive Request Form



(Appendix F) to the Program. Program staff will review the documents. If staff have any concerns about the report meeting Energy Audit Report Requirements (outlined in Appendix E), the applicant will be contacted for additional information.

### **Step 8: Receive First Incentive Check**

Provided that all Program requirements are met, the Program will reimburse the applicant for 75% of the cost of the energy audit. This is the first of two potential incentive payments. To be eligible for this incentive, the energy audit(s) must be completed within 6 months of the application approval date.

To receive the second level of incentive payment, applicants must complete Steps 9 and 10 below, in which they implement some or all of the recommended energy efficiency measures. To assist with this process, applicants will be sent information about other New Jersey Clean Energy incentive programs along with their first incentive check. The NJ Clean Energy incentives can help offset the cost of installing the eligible energy efficiency measures that are recommended in the energy audit report. For more information on the other New Jersey Clean Energy incentive programs, visit [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb) or contact the Program staff.

### **Step 9: Implement Recommended Energy Efficiency Measures; Submit Measures Implemented Form & Invoices**

A list of recommended energy efficiency measures will be included in each Energy Audit Report. In order to receive the second level of the incentive payment, the applicant must install sufficient recommended energy equipment upgrades whose costs, net of any incentives, are equal to or greater than the remaining portion of the energy audit cost (see Examples in Section II.A. above). To receive the second incentive payment, the applicant must submit a Measures Implemented Form (Appendix G) with material and labor invoices attached. Program staff reserves the right to inspect any or all of the work completed as it relates to the incentives.

### **Step 10: Receive Second Incentive Check**

Upon approval of the Measures Implemented Form, the Program will reimburse the applicant for the remaining portion of the eligible energy audit cost if the net cost of the implemented measures exceeds the remaining cost of the energy audit.



## V. SUBMISSION REQUIREMENTS

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As noted in the ten steps above, the following documents must be submitted to the Program in order to receive the full incentive amount.

- Application (Appendix B, Part A and B), including governing body resolution
- Facility Data Form (Appendix C)
- Scope of Work Recommendations, Appendix D)
- Cost Proposal for the Scope of Work
- Energy Audit Report (Energy Audit Report Requirements, Appendix E)
- Energy Audit Incentive Request Form (Appendix F)
- Measures Implemented Form (Appendix G)

Program staff is available to answer questions regarding any of the forms, reports, or requirements listed above.

## VI. TERMS AND GENERAL CONDITIONS

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This solicitation does not commit the Administrator to approve an application, pay any costs incurred in preparing an application, or to procure or contract for services or supplies. The Administrator or the Commercial/Industrial Market Manager may request additional data or material to support applications. The Program reserves the right to accept or reject any or all forms received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in the Administrator's best interest.

**Endorsement** – The Commercial/Industrial Market Manager does not endorse, support or recommend any particular manufacturer, energy auditor, product, or system design in promoting this Program.

**Warranties** – THE COMMERCIAL/INDUSTRIAL MARKET MANAGER AND ADMINISTRATOR DO NOT WARRANT THE PERFORMANCE OF INSTALLED EQUIPMENT, AND/OR SERVICES RENDERED AS PART OF THIS PROGRAM, EITHER EXPRESSLY OR IMPLICITLY. NO WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER STATUTORY, EXPRESSED, OR IMPLIED, INCLUDING, WITHOUT LIMITATIONS, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE REGARDING EQUIPMENT OR SERVICES PROVIDED BY A MANUFACTURER OR VENDOR. CONTACT YOUR VENDOR/SERVICES PROVIDER FOR DETAILS REGARDING PERFORMANCE AND WARRANTIES.

**Limitation of Liability** – By virtue of participating in this Program, applicants agree to waive any and all claims or damages against TRC Energy Services, the Commercial/Industrial Market Manager, and the Administrator, except the receipt of the Program Incentive. Applicants agree



that the Market Manager's and Administrator's liability, in connection with this Program, is limited to paying the Program Incentive specified. Under no circumstances shall the Market Manager, its representatives, or subcontractors, or the Administrator, be liable for any lost profits, special, punitive, consequential or incidental damages or for any other damages or claims connected with or resulting from participation in this Program. Further, any liability attributed to the Market Manager under this Program shall be individual, and not joint and/or several.

**Applicant's Certification** – Applicant certifies that it obtained the energy audits as required and installed any eligible equipment listed in their application at their defined New Jersey location. Participating Customer agrees that all information is true and that it has conformed to all of the Program energy auditing and equipment requirements listed in the application.

**Termination** – The Program reserves the right to extend, modify (this includes modification of Program Incentive levels) or terminate this Program without prior or further notice.

## VII. GLOSSARY

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The following definitions are provided for guidance only.

**Administrator** – New Jersey Board of Public Utilities, Office of Clean Energy.

**Baseline Energy Use** – A calculation of energy use for a building or piece of equipment for a specified period that is used to project energy use had the energy efficiency measures not been implemented.

**Energy Audit** – Survey of the existing energy systems of a facility for the purpose of proposing energy efficiency and renewable energy measures and verifying that the proposed measures have the potential to generate energy savings. The results of an Energy Audit are presented in a written report that includes a methodology for the calculation of the Baseline Energy Use, a description of physical conditions, equipment counts, nameplate data, and control strategies.

**Energy Efficiency Measure** – A measure to reduce energy use or costs, such as the installation of equipment or systems, modification of equipment or systems, or revised operation and maintenance procedures.

**Energy Use History** – A detailed summary of the annual energy consumption of a particular facility prior to project implementation. The history shall include energy use, demand, and cost data by fuel type. It is used to prepare the Baseline Energy Use.

**Local Government Agency (also applicant)** must be: 1) a contracting unit under the Local Public Contracts Law [N.J.S.A. 40A:11-2(1)], or; 2) a board of education under the Public School Contracts Law [N.J.S.A. 18A:18A-2(a)], or; 3) a county college under the County College Contracts Law [N.J.S.A. 18A:64A-25.2(a)].



**Kilowatt (kW)** - A unit for measuring power, equal to one thousand watts. A kilowatt is roughly equivalent to 1.34 horsepower. It is also referred to as 'electricity demand.'

**Kilowatt-hour (kWh)** - A unit of energy, equivalent to 1,000 watt-hours. It is the measure of electricity most commonly used on electricity bills and for electricity consumption analysis.

**Market Manager** - the New Jersey Board of Public Utilities Commercial/Industrial Market Manager, TRC Energy Services.

**Request for Proposal (RFP)** - An invitation for contractors, through a bidding process, to submit a proposal on a specific product or service.

**Scope of Work** - An agreement of the work that is to be performed at a facility for a particular cost.

**Societal Benefits Charge (SBC)** – The Societal Benefits Charge Fund was created by the state of New Jersey's 1999 Electricity Restructuring Law, requiring all electric and gas utility customers to pay a small charge on their monthly bills.

**Therm** –A unit of heat energy equal to 100,000 British thermal units (BTU). It is approximately the energy equivalent of burning 100 cubic feet (often referred to as 1 ccf) of natural gas at standard temperature and pressure (STP).



## APPENDIX A - LIST OF PREQUALIFIED ENERGY AUDITING FIRMS

State of New Jersey, Department of the Treasury, Division of Purchase and Property, Award T-2545, MUNICIPAL / LOCAL GOVERNMENT ENERGY AUDIT PROGRAM Awardees:

Camp Dresser and Mckee, Inc.  
Two Penn Center Plaza  
1500 JFK Boulevard, Suite 624  
Philadelphia, PA 19102  
Contact: Ted Schlette, 215-239-6526

Clough Harbour and Associates, LLP  
2001 Route 46, Waterview Plaza, Suite 107  
Parsippany, NJ 07054-1315  
Contact: Paul Van Gelder, 973-299-1100, ext. 231

Concord Engineering Group, Inc.  
520 S. Burnt Mill Road  
Voorhees, NJ 08043  
Contact: Michael Fischette, 856-427-0200

Dome-Tech Group  
510 Thornall Street, Suite 170  
Edison, NJ 08837  
Contact: Erik Miller, 732-590-0122, ext 125

Steven Winter Associates, Inc.  
8 Packard Road, Suite 1  
East Brunswick, NJ 08816  
Contact: Mr. Dominique Lempereur, 866-676-1972

Contract terms and awardees' contact information is available at:  
<http://www.state.nj.us/treasury/purchase/NOA/contracts/t2545.shtml>



## APPENDIX B – APPLICATION FORM (Part A)

*The Local Government Energy Audit Program provides funds to subsidize the cost of an energy audit and encourage the implementation of the recommendations in the energy audit report.*

The Local Government Energy Audit Program Application Form contains two parts – A and B. Completion and submittal of Part A is the first step to participating in the Program, and should be submitted before contacting any of the prequalified Energy Auditing Firms.

Part B should be submitted after the Energy Auditing Firm has been selected and the Scope of Work is finalized. Part B should be submitted with a copy of the Scope of Work, the Energy Auditor’s Cost Proposal, and the Facility Data Form for each building included in the Scope of Work.

### APPLICANT ELIGIBILITY CHECKLIST

*Please check all boxes that apply. You are not eligible to participate unless all four boxes are checked.*

<input type="checkbox"/> The facility(s) to be audited under this Application is located in New Jersey.
<input type="checkbox"/> The facility to be audited under this Application is owned by a local government agency.
<input type="checkbox"/> The local government agency is served by a regulated public New Jersey utility.
<input type="checkbox"/> The local government agency has not already reserved \$100,000 this calendar year through this Program for eligible buildings.

The local government agency applying wishes to be considered for Prioritization as noted in Section II.C above and certifies that it has met those requirements (please check one box only):

Yes       No

### CONTACT INFORMATION

*Please complete the information below for the primary contact for this program.*

<b>Primary Contact Name &amp; Title</b>		
<b>Local Government Agency</b>		
<b>Street Address</b>		
<b>City</b>	<b>State</b>	<b>Zip</b>
<b>Tax Identification Number</b>	<b>County</b>	
<b>Email</b>	<b>Phone</b>	<b>Fax</b>



**DISCLAIMER**

Acceptance into the Program is dependent on approval of the Scope of Work and cost proposal. Acceptance into the Program does not guarantee approval of the energy audit report. The Applicant must meet all Program rules to receive incentive funds from the Program. Neither the Commercial / Industrial Market Manager nor the Administrator is responsible for work performed by third parties.

**APPLICANT AUTHORIZATION**

<i>I understand the Program rules and procedures. I will not hold the Administrator or Market Manager responsible for work performed by a third party.</i>	
<b>Applicant Representative Signature</b>	
<b>Applicant Representative Printed Name</b>	<b>Applicant Representative Title</b>
<b>Date Submitted</b>	

Please mail, fax, or email your completed application to:

**New Jersey's Clean Energy Program  
 c/o TRC Energy Services  
 900 Route 9 North, Suite 104  
 Woodbridge, NJ 07095  
 Fax: 732-855-0422  
 Email: rkliemisch@trcsolutions.com**

For further questions, please call 866-657-6278 x4 or visit our website at [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb).

**STAFF USE ONLY**

Date Received: _____	Project No.: _____
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# APPENDIX B - APPLICATION FORM (Part B)

*The Local Government Energy Audit Program provides funds to subsidize the cost of an energy audit and encourage the implementation of the recommendations in the energy audit report.*

## CONTACT INFORMATION

*Please complete the information below for the primary contact for this application.*

<b>Primary Contact Name &amp; Title</b>		
<b>Local Government Agency</b>		
<b>Street Address</b>		
<b>City</b>	<b>State</b>	<b>Zip</b>
<b>Tax Identification Number</b>	<b>County</b>	
<b>Email</b>	<b>Phone</b>	<b>Fax</b>

## APPLICATION FORM CHECKLIST

*Please check the following:*

<input type="checkbox"/> I am attaching the proposed Scope of Work.
<input type="checkbox"/> I am attaching the agency's governing body resolution approving submission of this application.
<input type="checkbox"/> I certify price proposals were requested from each prequalified energy auditing firm.
<input type="checkbox"/> I am attaching a list of all firms who submitted a price proposal and their respective prices.
<input type="checkbox"/> I am attaching the cost proposal for the proposed Scope of Work from the selected firm.
<input type="checkbox"/> I am attaching a Facility Data Form for each building identified in the Scope of Work.
<input type="checkbox"/> I certify that the lowest priced firm was selected; or, if not, I have described below why the lowest priced firm was not selected.

Reason(s) for not selecting the lowest priced firm:

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**DISCLAIMER**

Acceptance into the Program is dependent on approval of the Scope of Work and cost proposal. Acceptance into the Program does not guarantee approval of the energy audit report. The Applicant must meet all Program rules to receive incentive funds from the Program. Neither the Commercial / Industrial Market Manager nor the Administrator is responsible for work performed by third parties.

**APPLICANT AUTHORIZATION**

<i>I understand the Program rules and procedures. I will not hold the Administrator or the Market Manager responsible for work performed by a third party.</i>	
<b>Applicant Representative Signature</b>	
<b>Applicant Representative Printed Name</b>	<b>Applicant Representative Title</b>
<b>Date Submitted</b>	

Please mail, fax, or email your completed application to:  
**New Jersey's Clean Energy Program**  
**c/o TRC Energy Services**  
**900 Route 9 North, Suite 104**  
**Woodbridge, NJ 07095**  
**Fax: 732-855-0422**  
**Email: rkliemisch@trcsolutions.com**

For further questions, please call 866-657-6278 x4 or visit our website at [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb).

**STAFF USE ONLY**

<b>Date Received:</b> _____	<b>Project No.:</b> _____
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# APPENDIX C - FACILITY DATA FORM

*Complete one Facility Data Form for **each** building. If you are seeking to energy audit multiple buildings, complete one Facility Data Form for each.*

## FACILITY INFORMATION

*Please complete the information below for this specific facility that is seeking enrollment in the Program.*

<b>Facility Name</b>			
<b>Street Address</b>		<b>County</b>	
<b>City</b>	<b>State</b>	<b>Zip</b>	
<b>Facility's Description</b>			
<b>Total Sq Ft</b>	<b>Year Built</b>	<b>Hours/Week Occupied</b>	<b>Number of Employees</b>
<b>Building Type (Check only one of the following):</b>			
<input type="checkbox"/>	<b>Emergency Services</b>	<input type="checkbox"/>	<b>Garage</b>
<input type="checkbox"/>	<b>Center/Meeting Hall/Library</b>	<input type="checkbox"/>	<b>Offices</b>
<input type="checkbox"/>	<b>Recreation/Entertainment/Parks</b>	<input type="checkbox"/>	<b>Religious</b>
<input type="checkbox"/>	<b>School</b>	<input type="checkbox"/>	<b>School: College</b>
<input type="checkbox"/>	<b>Water Treatment/Pumping</b>	<input type="checkbox"/>	<b>Other: _____</b>

## ENERGY DATA

*Please complete the energy information below for the most recent 12 month period available. In order to gain a complete picture of the facility's energy use, be sure to include all types of energy used by the facility. Do not include vehicle fuel.*

<b>The Data Below is for the 12 Month Period:</b> ____/____/____ to ____/____/____
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## ELECTRICITY

<b>Electric Utility Name &amp; Account Number(s)</b>	
<b>Annual kWh Use</b>	<b>Annual Electricity Cost</b>
<b>Max Summer kW</b>	<b>Max Winter kW</b>

## NATURAL GAS

<b>Natural Gas Utility Name &amp; Account Number(s)</b>	
<b>Annual Use in Therms</b>	<b>Annual Natural Gas Cost</b>

## FUEL OIL

<b>Fuel Oil Utility Name &amp; Account Number(s)</b>	
<b>Annual Use in Gallons</b>	<b>Annual Fuel Oil Cost</b>

## PROPANE

<b>Propane Utility Name &amp; Account Number(s)</b>	
<b>Annual Use in Gallons</b>	<b>Annual Propane Cost</b>

## OTHER

*In this section please indicate any other fuel type that the facility uses, such as: solar energy, wind energy, bio-fuel, cogeneration, fuel cells.*

<b>Other Fuel Type:</b>	
<b>Annual Energy Use (indicate units)</b>	<b>Annual Energy Cost</b>

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## APPENDIX D - SCOPE OF WORK RECOMMENDATIONS

1. The Scope of Work should be a stand-alone document and not be in letter format. The prequalified Energy Auditing Firm doing the work should also be clearly designated. In general, the Scope of Work for each building will range from four to eight pages.
2. The first section in the Scope of Work should contain a one- or two-paragraph description of the applicant's building (one Scope of Work for each). This description should include: name, location, age, type of building (office, school, fire station, etc.), square footage of building, number of employees, approximate annual energy cost, fuel type, use/cost (kW, kWh, MMBtu, dollars, etc.), and energy provider. It should also include the method of data collection (metering, motor nameplate etc.) and energy savings calculation (i.e. computer modeling, spreadsheets or manually, etc.).
4. The next section should divide the project into numbered tasks. Each energy system reviewed should be a single task. For example, if Task 1 were a lighting systems energy audit; the description under that task might note the existing technology currently in place. The energy audit might cover the entire facility and could include a review of lighting controls, reflectors, high efficiency ballasts, lamps, and a site review to reduce light levels for over illuminated areas.
5. Following the Tasks section would be a paragraph describing the project assumptions, as necessary. Examples might include who the Energy Auditing Firm should contact as they review the facilities, or provide any information the customer might offer for the consultant to complete the energy audit.
6. Following the Assumptions section should be a one-paragraph section describing the Deliverables (see also Appendix E). This should clearly state that a draft report will be forwarded to the Program staff. It should also note that comments made by the Program staff will be addressed in a final report. Finally, the deliverable should also include a Project Summary Sheet and a Case Study.
7. Following the Deliverable description should be a schedule to complete each of the tasks. This schedule should be in a "weeks from notice to proceed" format. For example: Kick-off meeting within two weeks of notice to proceed; Task 1.0 completed within four weeks of notice to proceed, etc..
8. Finally, a detailed project budget broken out by task should be attached. For each task, the number of hours and dollars to be spent should be clearly indicated. This will provide a clear understanding of how much emphasis is being placed on each task and therefore, the level of detail that can be expected.



In general, the Scope of Work should eliminate any ambiguity about the project. It should be clear what the current status of the facility is, what will be reviewed in the study and in what detail the study will be done. The Scope of Work will be used as the basis for reimbursement by the Program. The final report will be compared to this document to determine if it has met the requirements of the Program. It should therefore, be as detailed as possible. Overall, the Scope of Work will help all parties involved understand what is expected of them and the other participants.



# APPENDIX E -ENERGY AUDIT REPORT REQUIREMENTS

The Purchase Bureau, Division of Purchase and Property, Department of the Treasury on behalf of the Board of Public Utilities (BPU), Office of Clean Energy (OCE) issued Request for Proposal (RFP) 08-X-395370. The purpose of this RFP was to solicit bid proposals to pre-qualify contractors (Energy Audit Firms) to perform Local Government Energy Audits. This RFP outlined the Energy Audit Report Requirements under this Program. The following report requirements are taken from Section 3.3.3 of RFP 08-X-39537.

### **3.3.3 ELEMENTS OF THE AUDIT REPORT**

The Auditing Firm shall prepare an Energy Audit Report that incorporates each of the following elements:

- a) Historic Energy Consumption: 1) Compile energy usage and costs for each facility/building for the twelve months prior to the audit including kW, kWh, BTUs, therms, etc. and shall include billing meter readings that corroborate usage. 2) Identify the utility rate schedule under which services are provided to each meter. 3) Enter the required building and utility data into the U.S. Environmental Protection Agency's (EPA) *Portfolio Manager* energy benchmarking system. Note the EPA Score for each building, and provide the information necessary to access the *Portfolio Manager* account.
- b) Facility or Measure Description: Characterize building usage and occupancy profiles, facility size, construction features including an assessment of the building envelope (windows, doors, insulation, etc.) and equipment description and operations.
- c) Equipment List: Provide a detailed inventory of equipment, which contains pertinent information for all energy consuming equipment including estimate of equipment efficiency and remaining useful life. For example, for lighting, for each area of each building, provide existing fixture type, existing lamp type, existing lamp count and existing ballast type, current watts per fixture and current energy cost per room/building. Similar detail should be provided for other equipment.
- d) Energy Conservation Measures: Provide a narrative summary for each energy conservation measure recommended. For example, for lighting recommendations, for each area of each building, provide proposed fixture type, proposed lamp type, proposed lamp count, proposed ballast type, total watts per proposed fixture, projected energy savings per room, projected energy cost savings per room and before and after lighting levels. Similar detail should be provided for other measures.

1. Clearly document the key assumptions made in analyzing each measure and describe the method of analysis. Provide the following for each recommended energy conservation measure:
  - Description of energy conservation measure
  - Estimated installation cost and source of cost estimate
  - Estimated energy savings (kW, kWh, therms, etc.)
  - Estimated annual energy cost savings (including any assumptions regarding future energy costs, life of measure, etc.)
  - Estimate of any rebates/financial incentives available through New Jersey's Clean Energy Program or from other sources
  - Estimated annual operating cost savings
  - Estimated lifetime energy cost savings
  - Simple payback
  - Estimated return on investment
  - Options for funding the installation of recommended measures
  
- e) Renewable/Distributed Energy Measures: The contractor shall perform a high level assessment of renewable and distributed energy technologies which includes:
  1. Recommendations on the potential/viability of various renewable/distributed energy technologies
  2. Identification of available grants and incentives and sources of funding
  3. Analysis of costs and savings comparing current and future costs of electric and thermal energy with and without each technology assessed
  
- f) Energy Purchasing and Procurement Strategies: For each facility:
  1. Develop a load profile for each electric and natural gas account
  2. Provide an analysis of the utility tariff under which the facility is currently served
  3. Assess potential savings from purchasing from third party suppliers
  
- g) Method of Analysis: Provide a description of and documentation for and tools used to perform energy use and energy savings estimates.
  1. Clearly identify all assumptions and estimates used in the analysis



# APPENDIX F - ENERGY AUDIT INCENTIVE REQUEST FORM

*The Local Government Energy Audit Program Energy Audit Incentive Request Form is used to request the first incentive payment from the Program.*

## CONTACT INFORMATION

*Please complete the information below for the primary contact for this application*

<b>Primary Contact Name &amp; Title</b>		
<b>Local Government Agency</b>		
<b>Address</b>		
<b>Phone</b>	<b>Fax</b>	<b>Email</b>

## INCENTIVE INFORMATION

*Complete the information below to request your incentive payment.*

- I have attached the Energy Audit Report.
- I have attached a copy of the Energy Audit Invoice from the Energy Auditing Firm.

The total cost of the Energy Audit was \$\_\_\_\_\_.

I am requesting the first portion of my incentive, 75% of the energy audit cost, which is \$\_\_\_\_\_.



## PAYMENT INFORMATION

The incentive check for the first portion of your energy audit cost will be sent to the contact listed below.

<b>Make Incentive Checks Payable to:</b>
<b>Mailing Address:</b>

## APPLICANT AUTHORIZATION

<i>I certify that all information within this form is true. I understand the Local Government Energy Audit Program rules and procedures. I will not hold the Administrator or Market Manager responsible for work performed by a third party.</i>
<b>Applicant Representative Signature</b>
<b>Applicant Representative Printed Name</b>
<b>Date Submitted</b>

Please mail, fax, or email your completed application to:

**New Jersey's Clean Energy Program  
c/o TRC Energy Services  
900 Route 9 North, Suite 104  
Woodbridge, NJ 07095  
Fax: 732-855-0422  
Email: [rkliemisch@trcsolutions.com](mailto:rkliemisch@trcsolutions.com)**

For further questions, please call **866-657-6278 x4** or visit our website at [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb).

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# APPENDIX G - MEASURES IMPLEMENTED FORM

*The Local Government Energy Audit Program Measures Implemented Form is used to request the 2<sup>nd</sup> incentive payment from the Program.*

## CONTACT INFORMATION

*Please complete the information below for the primary contact for this application.*

<b>Primary Contact Name &amp; Title</b>		
<b>Local Government Agency</b>		
<b>Address</b>		
<b>Phone</b>	<b>Fax</b>	<b>Email</b>

## INCENTIVE INFORMATION

*Complete the information below to request your incentive payment*

- I have attached a brief (approximately 1 page) description of the recommended energy efficiency measures that have been installed in the facility.
- I have attached a copy of the contractor/vendor invoices for the energy efficiency measures installed.
- I have attached a copy of the Market Manager's incentive approval letter(s) for the energy efficiency measures installed. The Market Manager will determine whether or not the net cost of the installed measures exceeds the level of investment required for this rebate.

The total cost of the Energy Audit Report was \$\_\_\_\_\_.

The total cost of the recommended energy efficiency measures installed was \$\_\_\_\_\_.

The total incentive approved by the Market Manager was \$\_\_\_\_\_.

The net cost of the energy efficiency measures installed (= total cost minus total incentive) was \$\_\_\_\_\_.  
(This must be at least equal to 25% of the energy audit cost)

I am requesting the second portion of my incentive, 25% of the energy audit cost, \$\_\_\_\_\_.



## PAYMENT INFORMATION

The incentive check for the second portion of your incentive will be sent to the contact listed below.

<b>Make Incentive Checks Payable to:</b>
<b>Mailing Address</b>

## APPLICANT AUTHORIZATION

<i>I certify that to the best of my knowledge, all information within this form is true. I understand the Program rules and procedures. I will not hold the Administrator or the Market Manager responsible for work performed by a third party.</i>
<b>Applicant Representative Signature</b>
<b>Applicant Representative Printed Name</b>
<b>Date Submitted</b>

Please mail, fax, or email your completed application to:  
**New Jersey's Clean Energy Program**  
**c/o TRC Energy Services, 900 Route 9 North, Suite 104**  
**Woodbridge, NJ 07095**  
**Fax: 732-855-0422**  
**Email: rkliemisch@trcsolutions.com**

For further questions, please call **866-657-6278 x4** or visit our website at [www.NJCleanEnergy.com/ssb](http://www.NJCleanEnergy.com/ssb).

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