

ICP Underwriting Period Documentation Requirements

Introduction

This specification provides guidance regarding documentation that must be included in the development of an ICP Underwriting Period Documentation Package, to designate a project as Investor Ready Energy Efficiency™.

1-Baseline

Baseline Analysis – files used to perform regression analysis

End-Use Energy Use Estimates – end-use energy use estimates (based on CBECS, bottom-up approach, or end-use metering)

Utility Data and Rates – raw utility data (12+ months, all energy types) and utility rate structure information

Weather Data – weather files corresponding to the baseline period (data typically includes OADB, HDD, CDD)

Baseline Asset Data – building asset, operational and performance data files (lighting and mechanical schedules, envelope, etc.)

Audit Forms & Field Observations – completed audit forms, field notes, and other documentation

Control Sequences – sequences of operation

Drawings – preferably as-built drawings and renovations

Performance Data Analysis – monitoring and/or trend data, and analysis results

Pictures – building, equipment, nameplates, etc.

Load Profiles – average daily load profiles, for weekdays and weekends, all four seasons

Interval Data – raw data files

2-Savings Calculations

Audit Report – complete report including baseline, building and systems descriptions, ECM descriptions, savings calculations, methodologies, performance analysis, cost estimates, and economic performance

Cost Estimates – documentation to support cost estimates

Model Input & Output & Weather Files – energy modeling input files, output files, TMY weather file, calibration and ECM modeling descriptions, and calibration weather file

Modeler-Auditor Credentials – credentials of person responsible for energy model / savings calculations

Spreadsheet Calculations – workbooks or other calculations tools

3-Design Construction & Verification

OPV Credentials – credentials of the person responsible for OPV effort

OPV Plan – OPV plan (targeted Cx plan) including Cx procedures, systems to be commissioned, roles and responsibilities, and Cx schedule.

4-Operations Maintenance & Monitoring

OM&M Plan – document describing roles and responsibilities for monitoring and maintaining equipment to help ensure energy performance persistence, energy performance metrics, monitoring method, and plan for remediation of issues.

5-Measurement & Verification

M&V Plan – M&V plan following the IPMVP.

6-PE or CEM Certification

PE or CEM certification for Project Developer responsible for the ICP Underwriting Period Documentation Package.