

## **FlexTech and IPNA Process Alignment**

Many affordable multifamily energy efficiency projects in New York State can leverage both FlexTech and IPNA for planning efforts. This document identifies the similarities between FlexTech and IPNA to expedite projects by aligning the processes. The consolidation will also reduce the administrative costs associated with performing redundant work.

### **IPNA Qualifies as a FlexTech Eligible Study**

The IPNA tool and report would qualify for FlexTech funding under the Primary Technical Service Area: “Level II Audit/Comprehensive Energy Study”. An IPNA can receive a 50% cost share for all work performed by the Energy Assessor; the non-energy/physical needs components of an IPNA would not qualify for FlexTech funding. Please ensure that calculations meet ASHRAE Level II audit standards; the calculations should include interactivity considerations and bin hour weather data, instead of solely applying TRM formulas.

### **Additional Program Opportunities for IPNA and FlexTech Projects:**

#### **[NYSERDA Low-Carbon Capital Support \(LCCP\)](#)**

If an IPNA project includes electrification or electrification readiness, it can pursue LCCP for an additional 25% cost share for the FlexTech study. However, there are additional [documentation requirements](#).

#### **[New York State Affordable Multifamily Energy Efficiency Program \(AMEEP\)](#)**

If an IPNA project develops a scope that pursues the comprehensive pathway for AMEEP funding, it can receive an additional 25% cost share when a Preliminary Incentive Offer Letter (PIOL) is issued. The PIOL must be issued within six months of the IPNA/audit report being approved by NYSERDA. Please note that the additional 25% cost share received in LCCP is not stackable with AMEEP’s 25% cost share.

### **Consolidation of FlexTech and IPNA Reporting Requirements**

FlexTech and IPNA have some overlapping application and documentation/reporting requirements. Energy solutions providers pursuing both IPNA and FlexTech for a single project should consider consolidating both into a single report that fulfills the requirements of both programs.

Both FlexTech and IPNA have standards established for the final report; however, the IPNA report does not require a specific structure for conveying the information. As a result, for projects pursuing both programs, they should consider FlexTech [Attachment B-1](#) when arranging the sections of their report:

#### **Report Form and Structure**

- Executive Summary
  - Intent
  - Approach
  - Tasks performed
  - Findings
  - Recommendations
  - Economics of recommendations
  - Explanation of any deviations from the scope of work during the project
- Background
  - Information on customer and project that is relevant to study
- Project Results/Recommendations
  - Project summary sheet
  - Evaluated measure findings
    - Energy and financial considerations
  - Evaluated measure findings
  - Economic analysis

- Additional Benefit
    - Greenhouse gas reduction, comfort, environmental benefit, etc.
- Supporting Documentation
  - Utility bills
  - Computer modeling considerations and calculations
  - Measured data logs

The content of the report should be informed by the requirements of the IPNA Standard. Each provider should ensure that the following topics are addressed in the body of their report:

#### Report Content

- Visual Survey
- Site
- Common areas
- Structure and foundation
- Building envelope
- Mechanical spaces and systems
- Life safety elements
- Interior elements
- Review of pertinent documentation
  - Violations, C/Os, architectural drawings, maintenance logs & plans, pest control contracts, training certificates
- Review of energy and water consumption data
  - 24 months of consecutive energy and water billing statements
  - Benchmarking data
- Diagnostic testing and system inspection
  - Carbon monoxide, natural gas leaks, moisture, boiler efficiency, indoor air temperature, ventilation airflow, etc.

#### Other Reporting Requirements

The FlexTech [Project Summary Sheet](#) includes baseline energy summary and energy savings summary metrics. The IPNA Tool has a tab called “FlexTech Project Summary” that populates all relevant information for the FlexTech Project Summary Sheet into a template. IPNA Providers can easily copy the data from the IPNA Tool and paste it into the FlexTech Project Summary Sheet.

### **FlexTech and IPNA Process Timing**

After receipt of a complete project package, NYSERDA reviews FlexTech submissions in approximately three weeks before notifying applicants of rejection or issuance of award.

IPNA review, on the other hand, may take longer. Also, measures implemented from an IPNA scope may require additional time based on the Affordable Housing Agency (HPD, HDC, or HCR) loan closing schedule.

The long lead time between the initial IPNA assessment and scope implementation may disqualify AMEEP projects from the additional 25% cost share if it exceeds six months after the awarded PIOL.

### **Questions?**

If you have any questions or would like to learn more about aligning the IPNA and FlexTech process, please email [IPNAReviews@nyserda.ny.gov](mailto:IPNAReviews@nyserda.ny.gov).