

# ConserFund Plus Technical Analysis Guidelines

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The Technical analysis is the basis for decisions about the likely success of the loan. It should show how much energy and money the proposed energy measure(s) will save, and more importantly, it should include enough information to show how those determinations were reached. It should also provide the information necessary to assess whether the expected payback period is reasonable.

The technical analysis should be completed by a qualified engineer or other professional such as a Professional Engineer (PE), a Certified Energy Manager (CEM) or an Accredited Commercial Energy Manager (ACEM), or a trained professional with at least ten years' experience in the energy conservation field. Ideally, it will address all the energy needs of a facility, and recommend actions in priority order. In some cases, vendors may prepare the technical analysis if only one type of energy measure

is under consideration.

Technical analyses will be rejected if they do not include:

1. Name, credentials and affiliation of provider
2. Description of facility, including age, use (e.g. office, laboratory, etc.) and square footage of all buildings to be retrofitted
3. Current energy use including accurate hours of operation, days/years of use, and 12 months of bills (for all energy sources relevant to the proposed projects) prior to date of application unless building has not been in use
4. Anticipated changes in energy use patterns—such as increased use due to replacement of broken equipment
5. Description of proposed energy retrofit(s) including sufficient technical specifications for equipment to enable reviewers to see clearly how equipment will work and how savings will be realized
6. Expected annual kWh/therms and Btu savings. List electricity and gas savings separately)
7. Expected length of service of proposed new energy measures
8. Cost of each measure
9. Monetary savings expected for each measure
10. Simple payback – approximately eight (8) years (simple payback=cost divided by annual savings)
11. Lifetime savings (annual savings times expected life of energy measure/equipment)
12. Summary of measures, costs and savings provided in the template available at [\(link\)](#)

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13. Certification on company letterhead that work will meet all applicable federal, state and local permitting requirements and codes, and that contractor will comply with Davis Bacon reporting requirements and Buy American provisions of the ARRA.

Please do not include:

1. Escalating energy costs
2. Maintenance savings (If maintenance savings are significant, note them in the text, but please don't include in the payback calculation.)

Additional issues may apply in the case of renewable or alternative transportation projects. Please call the Office of Regulatory Staff, Energy Office, at 803-737-8030 to discuss.