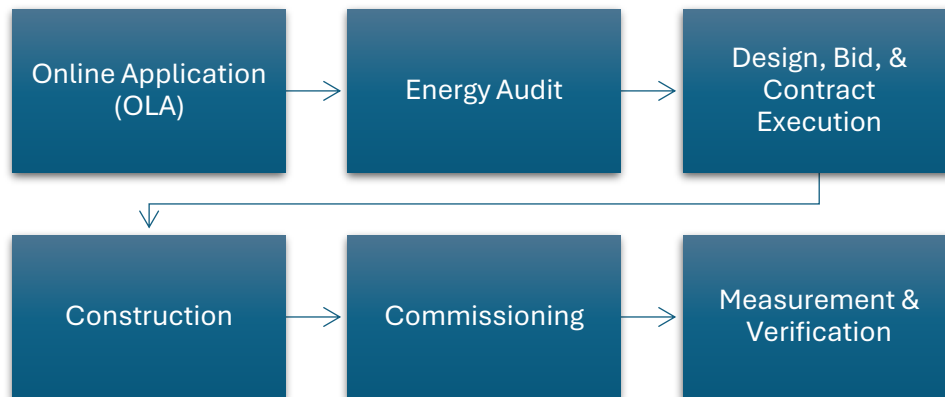


Engineered Solutions and Custom Advantage Deliverables Checklist

The image below summarizes the program life cycle of each project.

Projects enrolled in Custom Advantage may bypass the energy audit and/or design phase.

Measurement and Verification may be tailored based on scope of work.



Application:

- ☐ Completed online application (OLA)
- ☐ Signed OLA agreement by the customer
- ☐ Customer W-9 Form (dated within 2 years)
- ☐ Payee W-9 Form (dated within 2 years) if other than Customer
- ☐ Engineered Solutions Project Screening Workbook containing general details of facility
- ☐ Customer JCP&L Utility Bill (primary account), no more than 2 months old at time of submission
- ☐ Audit Proposal with fees (if applicable)

Energy Audit:

- ☐ Completed ASHRAE Level II Energy Audit Report *(not required for Custom Advantage projects)*
- ☐ Baseline facility energy usage and utility bill analysis; blended utility rates
- ☐ Engineering calculations used to develop estimated energy savings for each ECM, including any supporting documentation (spec sheets, nameplate photos, etc.)
- ☐ Cost Benefit Analysis Tool (CBA)
- ☐ Proposed project costs, including any supporting documentation
- ☐ Draft M&V Plan *(scope dependent, see Guide)*
- ☐ Estimated project schedule

Engineering Design/Bid/Contract Execution:

- ☐ Updated Engineering calculations with supporting documentation
- ☐ CBA Tool with updated project costs, engineering fees, and energy savings as applicable
- ☐ Documentation of cost and energy savings changes including updated savings calculations and written narrative summarizing reasons for changes (Written confirmation of no changes to design/savings to be provided, if not applicable)
- ☐ Signed contracts or POs, with building and measure level breakdown (Values should match CBA)
- ☐ Updated construction schedule, including forecasted start date, 50% completion, and 100% completion date for each measure, current construction status, and % complete of each measure, if applicable
- ☐ M&V plan revised based on design (*scope dependent, see Guide*)
- ☐ Payment schedule (If project is financed through NEIF, a construction progress payment schedule is required to properly have NEIF release funding)

Construction:

Upon completion of progress inspections during the Construction phase:

- ☐ Construction Inspection Reports, inclusive of photos, any applicable change orders, and contractor payment requests with line-by-line detail (preferably AIA forms)
- ☐ Progress Invoices with building and measure level breakdown

Upon completion of the Construction phase:

- ☐ Updated Engineering calculations with supporting documentation
- ☐ CBA Tool with updated project costs, engineering fees, and energy savings as applicable
- ☐ Documentation of cost and energy savings changes that occurred during construction and written narrative summarizing reasons for changes (Written confirmation of no changes to design/savings to be provided, if not applicable)
- ☐ Final Invoices with building and measure level breakdown (values should match CBA)
- ☐ Final Inspection Report
- ☐ Final M&V plan revised as needed (*scope dependent, see Guide*)

Commissioning:

- ☐ Commissioning report and punch list report showing no outstanding issues that impact energy savings for measures in scope

Measurement & Verification:

- ☐ M&V Report(s) based on approved M&V Plan.