

Retro-Commissioning Study Report Guidelines

These guidelines are provided to help you meet the requirements for receiving retro-commissioning incentives from the APS Solutions for Business Program.

Cover Page

- Customer name, project title, and location.
- Date submitted.
- Engineering firm conducting the study, including address and telephone number.

Executive Summary

- Briefly describe the report and its purpose.
- Describe the facility in as much detail as possible, including: facility size, age, general construction (brick, steel frame, etc), general dimensions (bldg height, # of floors, garage, etc), hours of occupancy and/or number of shifts, characterization of building usage, description of the base systems (lighting, HVAC, refrigeration, process, etc).
- Include a summary table with implementation/installation costs, annual energy savings, peak demand savings, potential incentives, and simple payback.
- Summarize the project and provide a prognosis for remaining actions.

The Retro-Commissioning Plan

Provide a detailed narrative for each energy system analyzed and EMS (if applicable). Clearly document key assumptions made in analyzing each system and describe the analysis method. Include the following information:

- Master list of findings with a description of the improvements implemented.
- Cost-benefit analysis of the estimated savings and actual costs for each improvement recommended, with a quantification of non-electric benefits.
- List of capital improvements recommended for further investigation.
- ECM trending plan and logger diagnostic/monitoring plan and annotated results.
- Recommended frequency for retro-commissioning by equipment type, with reference to tests conducted during the initial retro-commissioning.
- Strategies adopted to optimize systems operation and the reasons for selecting these strategies.

Appendices

- Completed program application forms for eligible incentives.
- Results from the ENERGY STAR Portfolio Manager benchmarking process, or the results from an agreed-upon alternative energy usage benchmarking approach.
- Building information summary form with typical building characteristics that can be placed in a spreadsheet.
- Completed site assessment form.
- All completed functional tests and results.
- Detailed cost breakdown (man-hours, rates, quantities, material, misc., etc).