# Task 6 Project Documentation Template, V1

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| Summary of Proposed ProjectDescription about the customer/facility/capacity and measures, including eligibility, influence, measure type, appropriate baseline, Calcs. and M&V plans

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| Describe existing and proposed plants, equipment, and measures, including customer size, vintage, functionality, customer’s business needs and wants, capacities; describe implementer’s roles (actions, timing in compared to the customer’s decision- making process). Summarize the high-level justifications about eligibility, influence, proposed measure type, and the baseline formation for each EEM being proposed; followed by engineering calculations and M&V plan. |

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| Eligibility and justifications

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| Project and measure eligibility checklists with information necessary to justify the implementer’s position.  |

Influence data and justifications

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| Project team needs to gather and document the following information, which is necessary for element assessment and reviews, before the team invests in significant effort in detailed engineering calculations and M&V plans. * + What’s really driving the project? First, describe a set of problems that the customer is trying to resolve, e.g., what are the business needs and wants of production, maintenance, reliability, capacity, competitiveness, productivity, regulations, etc.? Second, describe project evolution (business plans and stages) and range of motivators for the project development. [Note] The documentation needs to describe the main factors (including energy and non-EE factors) that the customer considered when it plans/designs/selects the project to meet its business needs. It’s understandable that energy efficiency, among many other factors, wouldn’t necessarily be the only or top factor.
	+ What are the common maintenance issues of existing system (if any) and the equipment involved? Describe barriers that the customer faces (if any) to adopting the new efficiency measure(s). What are the resources being looked for?
	+ Has the customer updated any of its existing measures/systems to another measure/system recently? If yes, when was it? Please explain the reasons for switching to the new measure/system.
	+ When and how did the implementer/engineer get involved in the specific custom project (e.g., in which stage of the custom project development), and what values does the implementer/engineer bring to the customer in the specific custom project. [Note] Simply providing estimates of potential savings alone for the customer doesn’t automatically qualify for program influence.
	+ What is the range of alternative solutions that the customer considered if any that also meet the customer’s needs? Understand and describe the range of vendors, equipment efficiency, capacity, and costs.
	+ What is the range of regulations (e.g., code, standards) applicable to the relevant process functionality and the EEM?
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Measure Type with Justifications

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| Determine the measure types with justifications, especially when AR or REA is to be assigned, which need to meet the definition and criteria (POE for AR). |

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| Baseline Assumptions and Justifications

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| Baseline assumption needs to be supported by justifications – Refer to the measure level baseline resolution including Task 1 resolution steps, and ISP Study guide Task 5 when necessary and applicable.  |

CalculationsM&V plans |