# Task 6 Project Documentation Template, V2. August 15, 2017

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| This document is designed to guide collection of necessary information from customers and vendors when applicable in order to ensure equitable and successful custom project development. Project developers should use the template when preparing for and submitting customer project proposals. PA reviewers and EAR team when applicable may use this template to evaluate the validity of assumptions and justifications made in the custom project. Address the following prompts in the spaces provided, add additional pages when necessary. 1. Project Title

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| *List full project title here**List the following** *Developer’s responsible person and manager’s phone numbers and email addresses*
* *Customer’s contact persons’ phone numbers and email addresses*
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2. Customer Summary

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| - *Provide a brief description of the customer, and existing facilities, equipment, and measures. Include an overview of customer size, vintage, and functionality.* - *Describe the customer’s current needs and want.* |

3. Project Summary

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| *- Summarize the intended project: does it address the customer’s needs and wants? What are the criteria and process for its decision-making? What are the business drivers for investing in the proposed project (including energy and non-energy factors)?**- Clearly include and justify the eligibility, measure type, influence and baseline for each proposed EEM.**- Describe the role of the implementer in the proposed project, including:* *- Intended actions* *- Timing of engagement with project relative to the customer’s decision-making process* *- Overview of calculation and M&V methodology* |

4. Measure EligibilityThe customer’s desired efficiency action must be eligible for the use of PG&E incentives, given the current framework of utility and CPUC rules.

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| *- Detail the issues that the customer currently faces with existing facilities, equipment, and measures, including maintenance issues and barriers to pursuing greater efficiency actions.**- Justify measure eligibility: What is the motivation behind the desired project, including both energy and non-energy factors? How does the project lead to an intended increase in energy efficiency?*  |

5. Measure TypeThe most accurately applicable measure types must be pursued to address the customer’s needs correctly.

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| *- Explain what measure options are available to the customer to reach their desired change in equipment/system;* *- List all EEMs intended to be pursued, and assign and justify measure type (NR, NEW, AR/ER, REA, BRO);**- Describe which measures are realistically being considered during the project development;* |

6. InfluenceImplementers must have a considerable role in influencing the customer to choose an incremental option to the existing equipment than what would be done by the customer anyway. Describe prior to implementer’s engagement, what the customer would be doing for the existing equipment/plant.

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| *- If the customer has updated any existing facilities and equipment in the past, explain when and why this occurred.**- Depict the range of alternative solutions that the customer considered to achieve to meet its functional needs: Describe the capital, energy efficiency level, lifetime, capacity and operation hours of each option in addition to the existing equipment/system. Explain the needs vs. wants.* *- Describe how and when the implementer entered the project timeline. What values and skills do they provide to the customer for the proposed project to initiate and progress?**- Provide narrative on how the implementer influenced the customer to pursue the incremental option when applicable: without them, would the customer have pursued this particular action?**- Justify the influence: direct technical design; informational (when applicable and accurate); financial expectation (when it’s accurately conveyed – avoiding false/unapproved info or imprudent promise to the customer).* |

7. BaselineIn the event that no existing or applicable ISP study is available, evidence must be shown that the pursued EEMs are standard practice to address the customer’s needs.

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| *- If there is an existing ISP, attach it along with any referenced code or standard practice assessment.* *- If there is no existing ISP applicable to the project, explain why. Refer to the measure level baseline resolution, including Task 1 resolution steps and the ISP Study Guide Task 5, if applicable.**- When multi options are available and the lowest-cost option as common practice is in question, obtain and provide details on how often vendors sell the EEMs in question versus other viable alternatives.* *- Provide narrative on the current market sales and installation trends related to the EEMs being pursued. Justify if this option be considered “standard practice” to serve as the project baseline?*  |

8. Calculations

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| *Provide an overview of the intended calculation methodology.* |

9. M&V

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| *Provide an overview of the intended M&V plan.* |

10. Notes

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| *List other relevant notes for project development, if any.* |

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