

DER Submittal Guide & Owner Responsibilities



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DER Required Information



General

1. Application information
2. DER goal, e.g. ZOT, Passive House
3. Willingness to participate in Cx
4. Method of shielding tenants from utility bill increase
5. Construction start date & phases if any
6. Project costs by DER measure, helpful to provide total costs too
7. Financing by source and whether earmarked for DER
8. Name of contractor & subs, if known

Audit & Scope

1. Detailed existing conditions
2. Gross square footage
3. Detailed scope, including specifications: make/model, number, efficiency, etc.
 - a. Do not include renewables, they will be disregarded

Energy Model of Final Scope (minimum required information)

1. MMBTU baseline & projected per measure
 - o Ok to include baseline & projected EUI
2. Model summary report & backup documentation
3. Name of firm & modeling tool

What to Submit for Costs & Financing

Formats:

1. Costs - can be bid sheet, schedule of values, price list, individual measure costs entered into DER Template, total category cost (e.g. when DHW part of plumbing), equivalent
 - Highlight DER categories on full lists
 - Don't itemize renewables but ok if on full list
 - It's not necessary to provide backup documentation for numbers entered into DER Template
2. Financing - itemized on DER workbook, separate doc, pro forma, equivalent
 - Identify what's earmarked if any
 - Don't include grants for renewables in DER Template but ok if part of separate doc

How to Submit

Application: <https://leanmultifamily.org/>

Supporting Documents & DER Template: email attachment or shared file
(Dropbox, Google, etc.)

Email: elis.krautscheid@bostonabcd.org

Owner Responsibilities

1. Submit LEAN application if not already recently in system
2. Make sure contractor completes background check
3. Ensure method for shielding tenants from electric bill increases due to electrification
4. Provide historical utility usage for master accounts, if needed
5. Obtain tenant account info, if applicable
6. Provide additional information to LEAN as requested
 - a. May include putting LEAN in touch with consultants, architects, etc.