



Customer Directed Option (CDO) Initiative



PROCESS AND INITIATIVE STRUCTURE

Process Description

1. Before starting the application process, check with the Compact's Lead Vendor to determine eligibility of the proposed project and to establish requirement for detailed savings projections and cost estimates. Installation should not begin until reviewed and approved by Lead Vendor.
2. Eligible customers must have an annual electric energy consumption less than 1,500,000 kWh. *(NOTE: Municipal, County, State and Federal Government buildings are not eligible for this initiative. Contact Cape Light Compact for programs available for these customers).*
3. Application shall include detailed specifications and scope of work proposed including, existing scenario, cut sheets of proposed equipment to be installed and pricing, including labor costs.
4. Submit the application to the Compact's Lead Vendor (aviveiros@therisegroupinc.com) for review and evaluation of potential incentives.
5. The Lead Vendor will conduct a pre-installation site visit to review existing conditions. The Lead Vendor will also assess the rest of the facility for additional energy savings opportunities which the Lead Vendor will bring back to the CDO Vendor for possible inclusion in the scope of work. If CDO Vendor declines the additional measures, the Lead Vendor can then submit a proposal to the customer for the additional opportunities only (the Lead Vendor is prohibited from providing a proposal to the customer on the proposed scope from the CDO Vendor).
6. After successful review and project approval, the Compact or its Lead Vendor will issue a Project Approval Letter to the CDO Vendor and the Customer. The Customer must sign the Project Approval Letter and return to the Lead Vendor within 30 days of issuance, or the incentive offer may be withdrawn.
7. Applicable permits must be secured for each application and a copy provided to the Compact's Lead Vendor.
8. The CDO Vendor must complete the proposed scope of work within 90 days from the date the customer signs the Project Approval Letter.
9. The CDO Vendor must receive the customer's signature on a Certificate of Installation, indicating that the work is complete, and the customer is satisfied with the install.
10. CDO Vendor alerts the Compact's Lead Vendor that the work is complete and submits required documentation, and the Lead Vendor will conduct a post-installation site visit.



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Project Data and Information Requirements

Pre-Installation Documentation – submit with initial application

General Project Description

- General description of facility, its use and typical operation; including hours of operation and occupancy schedules

Existing Materials and Equipment

- Detailed description of existing equipment type, energy consumption and hours of operation per area
- Description of any existing controls and sequence of operations

Proposed Materials and Equipment

- Detailed description of proposed equipment type, energy consumption and hours of operation per area
- Cut sheets for the materials or performance ratings for equipment being installed
- Description of proposed controls and sequence of operations

Energy Savings Calculations

- Show all calculations used to determine energy savings.
- The calculations should clearly show all the details of how the energy savings were estimated. This includes all engineering formulas and documentation of all the factors, values and assumptions used in the formulas.
- In cases where energy modeling is used to determine savings, approved modeling software must be used. Input and output data from the model must be provided.

Post-Installation

Documents – to be submitted to Compact's Lead Vendor after installation is completed

- A copy of applicable permit(s) secured to support the work in accordance with MA codes and regulations
- An "as-built" Scope of Work that highlights any changes or variances from the original pre-approved Scope of Work
- A CDO Contractor's Certificate of Installation, signed by the Customer. This confirms that the project is complete, and the Customer is satisfied with the installation

Incentive Payments

- The Customer or the CDO Vendor must notify the Compact's Lead Vendor that the project is complete and submit the final required documentation.
- Incentives will be paid out based on project cost, as determined by Cape Light Compact guidelines.
- The CDO incentive offer is only available for retrofit projects and may not be combined with other offers from the Compact or any other Mass Save® program (e.g., New Construction, prescriptive applications, etc.).
- Any materials purchased for use in a CDO project cannot receive a Midstream incentive. Please ensure that you inform your material supplier that the materials for your CDO project should not be submitted for Midstream incentives.
- Any projects found to be in violation of this prohibition will not be eligible to receive incentives via the CDO program. Abuse of this guideline will risk your future participation in the CDO program.



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Incentive Structure

Eligible Measures	Lighting without Controls	Heat Pumps
Up to 70%	Up to 50%	Prescriptive Rebates – must submit through Rebate Portal, not CDO

Measure Examples	
Air Sealing & Insulation	Thermostats
Refrigeration Controls, Cooler Upgrades, Economizers	Kitchen Hood Controls
Variable Speed Drives or Variable Frequency Drives	Vending Machine Controls
Building Management System	Pool Heaters, Covers & Pumps
Pipe Insulation	WaterOSaving Measures & Equipment
HVAC System Upgrades & Controls	Custom Measures
LED Fixtures & Controls	