

Q&A from Zoom Meeting webinar in partnership with IDEA and NYGB regarding NYSEDA's draft solicitation for Community Heat Pump Systems:
<https://www.districtenergy.org/events/event-description?CalendarEventKey=e25b0147-fc29-4310-a710-22cf14a3690d&Home=%2fevents%2fwebinars>

All comments received by close of business Friday November 6, 2020, will be given thoughtful consideration

How to provide feedback: Email to Dana.Levy@nyserda.ny.gov Telephone Dana Levy at (518) 862-1090 x3377

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Adjunct technologies	Would microgrids involving CHP or fuel cells qualify for district energy microgrids, or only renewables + heat pumps?	<p>The primary technology focus of the solicitation is electric-driven heat pumps. Proposals for studies can include the use case of sizing the heat pumps to address the majority of the dominant thermal load (whether heating or cooling) for the site, and assessing the economics of supplementing with adjunct technologies such as CHP or fuel cells where it could be expected that the hybrid approach will be less-costly or technologically feasible than an all-heat-pumps approach.</p> <p>Proposals for construction projects that involve using heat pumps to address the majority of the dominant thermal load for the site and supplement with adjunct technologies such as CHP or fuel cells should request a reduced incentive because the justification for inclusion of those adjunct technologies in the proposal is based on the hybrid approach being less-costly than an all-heat-pumps approach.</p> <p>Hybrid systems consisting of heat pumps coupled with right-sized CHP or fuel cells might add value at locations where the localized electric utility distribution circuit cannot deliver additional power to support beneficial electrification.</p>	
	What is the project boundary? For example will equipment needed to upgrade building heating / cooling systems be eligible for the incentive?	Studies need to assess whatever upgrades of equipment are integral to the HVAC system(s) of the site. Construction projects will need to implement such upgrades in order for the new community-style heat pump system to properly function. For construction projects, the cost of such upgrades should be included in the calculation of "investment threshold," which is a key step in calculating the magnitude of a construction incentive that a Category C proposal should request.	

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	It will be interesting to see how thermal storage components are incorporated - which is an element of all closed loop systems - but more concentrated borehole storage and/or phase change components shave peak periods and level out system wide efficiency.	NYSERDA encourages stakeholders to conceive of project configurations that, upon validation supported through the solicitation, have the potential to lower costs and/or increase performance for subsequent replications and can be widely replicated in New York State. Proposers should provide compelling information to indicate that their project concepts are well-conceived for construction and operation, including their choice of primary and adjunct technologies.	
Affordability	Can you please define affordable solutions	<p>The solicitation is primarily intended to explore capital, operating, and lifecycle relative costs (looking for solutions configured as community-style heat pumps that can be less-expensive than similar solutions configured as single-building-heat-pump deployments).</p> <p>Furthermore, the solicitation seeks to understand project opportunities that can unlock the market where absolute costs relative to a fossil fuel option can be nurtured with declining incentives.</p>	
	Any thoughts on how you recommend we factor in potential/future/prospective governmental building greenhouse gas emissions penalties, e.g., or should we just use current legislation?	<p>While the primary focus is relative costs (as explained above) there is also interest in absolute costs. Modeling based on current legislation is appropriate.</p> <p>Additionally, it would be informative for studies to include a "what if" sensitivity analysis to illustrate the implications of a range of cost-of-carbon possible regimes (this will help to enlighten on possible policy considerations).</p>	
	How do you plan to address the cost disparity between low cost	While the primary focus is relative costs (as explained above) there is also interest in absolute costs. Proposers might -- or	

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	NG and high cost Elec as it relates to affordable?	might not -- opt to focus their projects in localities where natural gas is not available or under moratorium, as well as localities where electricity is relatively lower cost.	
Budget/Incentives	Is the \$15M under this solicitation intended for a single award?	No. Each category in the draft solicitation is capped with a maximum per-project award (Category A \$100,000; Category B \$500,000; Category C \$4,000,000; Category D \$250,000).	NYSERDA invites feedback as to whether stakeholders think that these per-project award caps will be adequate to stimulate proposals for projects.
	Why is the cost-share so much higher than it was for the NY Prize Program which was only 15%?	<p>NYSERDA's market research revealed that catalyzing the community thermal market would require different types and scales of incentives relative to those offered under the NY-Prize program.</p> <p>The draft solicitation indicates that NYSERDA is inclined to offer for Category A (Scoping Studies) up to \$100,000 per project without requiring any cost-share (this is similar to NY-Prize Stage One); for Category B (Detailed Design Studies) up to \$500,000 per project and require 50% cost-share (in contrast, NY-Prize Stage Two offered up to \$1,000,000 and required 15% cost share). NY-Prize program budget was \$20 million for Stages One and Two (and intended another \$20 million for construction projects via Stage Three), in contrast the available budget for the roll-out of the Community Heat Pump Systems solicitation is \$15 million for all four categories (A, B, C, and D), and thus the draft solicitation indicates that NYSERDA is inclined to require 50% cost-sharing on Category B proposals.</p>	NYSERDA invites feedback as to whether stakeholders think that these cost-sharing requirements will stimulate proposals for projects.

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Category D (market potential studies/best practices guidebooks)	Can you please provide additional information on what is being asked for market potential studies/best practices guidebooks (Category D) as shown in slide 32?	<p>Please see the applicable section of the draft solicitation posted here www.nyserda.ny.gov/district-thermal-systems and if you have further questions please contact Dana Levy.</p> <p>Category D (Best Practices Guidebooks) is intended to be of value to the entire marketplace (for example, guidance on business models, guidance regarding regulations/authorities having jurisdiction, etc.) For example, a study regarding regulations/authorities having jurisdiction that addressed the entire state (including a small chapter on Long Island) would be eligible because the Long Island portion would be integral to a treatise on the statewide marketplace and would be a de minimis diversion of funds to the benefit of non-SBC paying customers (however, a study regarding regulations/authorities having jurisdiction that addressed only Long Island would not be eligible). Okay to include a little of the dog wagging the tail, but cannot configure as the tail wagging the dog.</p>	
Eligible participants	Do applicants need to have MOUs or letters of commitment from building owners in order to participate? Or can proposers apply to study a circumscribed area and include an estimate of occupied space and/or building energy use in order to indicate scale?	This question is particular to Category A (Scoping Studies) because inherently the participating sites must be explicit for Categories B and C (Detailed Design Studies, and Construction Projects). The draft solicitation indicates that the proposal must "[p]rovide documentation of ownership, site control and/or permission of the property owner for proposed sites that will be the subject of scoping activity" and this should be furnished regarding essential anchor clients as well as regarding as many other potential clients as practicable within a circumscribed area.	

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	Are NYS/ NYC agencies, such as Parks Department, DEP, DEC amenable to the use of their resources for heat pumps?	While NYSEDA cannot speak for any other governmental entity, the intent of the solicitation is to help pioneer these kinds of discussions so as to simplify the process for follow-on replicable projects. It would be appropriate for a proposer to have exploratory conversations with such a key agency prior to submitting a proposal to the solicitation, so that the proposal can offer an informed and likely solution.	
	What about municipal electric utilities (Muni's)?	End-use customers to be served by the proposed community-style heat pump system must pay the System Benefits Charge (SBC) on either a portion or on their entire electric bill at the thermal usage site, or in the case where an end-use customer's facility will be new construction will pay the SBC once the facility is built. Many municipal electric utilities do not pay SBC on any fraction of their electric utility bill and therefore customers served by that municipal electric utility would be ineligible. Other municipal electric utilities pay the SBC on a fraction of their electric utility bill – NYSEDA would need to review on a case-by-case to see how much of a fraction/how often/how recently in order to make a determination regarding project eligibility.	
	What about team members being European experts and/or companies? Put another way, is there a "buy NY" requirement?	There is not an explicit "buy NY" requirement for this particular program (Community Heat Pump Systems). Here, NYSEDA's primary goal is to enable NYS-customers to acquire world-leading advice and technology at cost-effective pricing and therefore there isn't a Buy-NY requirement in this particular solicitation. NYSEDA is excited to import some of the successes that have paved the way in Europe (or anywhere else).	

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	Who would be responsible for maintenance of the system and cost there of?	Proposals should explore and establish a business model that defines the key relationships, such as system ownership, system maintenance, billing structure, etc.	
	Does real estate serviced by NYPA qualify for this program?	End-use customers to be served by the proposed community-style heat pump system must pay the System Benefits Charge (SBC) on either a portion or on their entire electric bill at the thermal usage site, or in the case where an end-use customer's facility will be new construction will pay the SBC once the facility is built. Some customers serviced by NYPA don't pay the SBC on any fraction of their electric utility bill and therefore would be ineligible. Other customers serviced by NYPA pay the SBC on a fraction of their electric utility bill – NYSERDA would need to review on a case-by-case to see how much of a fraction/how often/how recently in order to make a determination regarding eligibility.	
	Can a participating utility use funds from their portion of the NY Clean Heat Program \$454M CEF funds to augment a proposed project?	The draft solicitation indicates that NYSERDA is inclined to offer for Category A (Scoping Studies) up to \$100,000 per project without requiring any cost-share. In the rare event that a Scoping Study is proposed that is so complex that it will cost more than \$100,000 the project cannot propose to fund the overage using funds from other NYSERDA programs nor using ratepayer funds administered by the utility (the draft solicitation at Category A says "For projects under Category A, the scope of work proposed must not be otherwise funded by NYSERDA nor funded using ratepayer funds administered by the utility").	

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		<p>The draft solicitation indicates that NYSERDA is inclined to offer for Category B (Detailed Design Studies) up to \$500,000 per project and require 50% cost-share. The project cannot propose to fund the 50% cost-share using funds from other NYSERDA programs nor using ratepayer funds administered by the utility (the draft solicitation at Category B says "For projects under Category B, the scope of work proposed must not be otherwise funded by NYSERDA nor funded using ratepayer funds administered by the utility").</p> <p>The draft solicitation indicates that NYSERDA is inclined to offer for Category C (Construction) up to \$4,000,000 per project and require 50% cost-share. The project should maximize collection of incentive funds from other NYSERDA programs as well as from utility programs (including utility programs that administer the NY Clean Heat Program \$454 million CEF funds) as well as investment tax credits etc. and then determine the project's "shortfall" in meeting the project investor's investment hurdle threshold, then propose to this solicitation to request the specific amount of additional incentives needed to close-the-gap to achieve investability. The amount of "shortfall" funds being requested via the Community Heat Pump Systems solicitation cannot push the ratepayer portion to exceed 50% of the total project costs necessary to get the project constructed/commissioned (the draft solicitation at Category C says "Cost sharing for the proposed scope of work can be from the proposer, other team members, and other government or private sources, except cost-sharing cannot be from other NYSERDA programs nor</p>	

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		<p>from ratepayer funds administered by the utility"). Here is an example: For a scenario where the project total cost is \$10 million and the project receives \$1 million from other NYSERDA programs as well as \$2 million from utility programs, the project could request up to \$2 million from the Community Heat Pump Systems solicitation -- summary: \$1 million from other NYSERDA programs \$2 million from utility programs \$2 million from Community Heat Pump Systems solicitation \$5 million non-ratepayer funds Thus 50% is non-ratepayer</p>	
	<p>Would swapping a residential street from natural gas heating to ground source heat pumps be the type of projects this funding is looking for?</p>	<p>Yes, this type of project would be eligible to propose to the solicitation. At time of proposal, the proposer would need to explain why they expect that a community-style system would be likely to achieve this swapping at lower-cost compared to if each house on the residential street were to install their own individual heat pump system.</p>	
	<p>Can you have an application that is mix of SBC and non-SBC paying customers</p>	<p>Yes, as long as the relative proportion of non-SBC paying customers is de minimis (to be determined by NYSERDA). For example, if a project is intended to serve a city block, and almost all buildings/almost all load pays SBC while a minimal amount of buildings/load does not pay SBC, it would be counterproductive to have the non-SBC load be excluded from the community-style system. Okay to include a little of the dog wagging the tail, but cannot configure as the tail wagging the dog.</p>	
	<p>Based on Dana's comment seems Lake Placid might be a fit - they do have a PPA with NYPA and</p>	<p>NYSERDA would need to review on a case-by-case basis for this specific site to see how much of a fraction/how often/how recently they paid SBC through their National Grid purchases</p>	

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	<p>then purchase from National Grid once they go beyond that "hydro allotment". Can someone check if that makes Lake Placid eligible for this program and possibly other NYSERDA programs typically associated with the SBC? The Peaks project is very actively working to secure financing for the energy projects - so NYS incentives of any kind will help a lot!</p>	<p>in order to make a determination regarding eligibility. A follow-up conversation would be appropriate.</p>	
	<p>Are investor owned utilities eligible to submit projects to the NYSERDA district program? If so, are there any pre-conditions?</p>	<p>Yes, investor-owned utilities are eligible to submit projects to the program.</p> <p>However, there are some caveats:</p> <p>At time of proposal the issue of regulatory complications should be discussed (the draft solicitation at Category A/Category B/Category C says "If the proposal intends to explore ownership by a utility or by a public entity, please explain the anticipated regulatory regime and indicate whether regulatory compliance appears feasible").</p> <p>Also, the draft solicitation at Category A/Category B/Category C says "cost-sharing [generally] cannot be from other NYSERDA programs nor from ratepayer funds administered by the utility."</p>	

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		<p>Furthermore, in Category A and Category B the draft solicitation says “[f]or projects under Category A/Category B, the scope of work proposed must not be otherwise funded by NYSERDA nor funded using ratepayer funds administered by the utility.”</p> <p>Finally, for Category C Evaluation Considerations the draft solicitation says “[t]he potential for appropriate leveraging of other sources of public/ratepayer funds (as opposed to displacing those other sources).”</p>	
	<p>Maybe already asked, but is NYCHA public housing development eligible? I understand a portion of their energy charges pay into the SBC...but may be dependent on development.</p>	<p>NYSERDA would need to review on a case-by-case basis for this specific site to see how much of a fraction/how often/how recently they paid SBC through their ConEd purchases in order to make a determination regarding eligibility. A follow-up conversation would be appropriate.</p>	
<p>Invitation for feedback</p>	<p>What are you expecting as a feedback? Is it the proposal per se?</p>	<p>NYSERDA has made available to the public and stakeholders a draft of the upcoming solicitation for Community Heat Pump Systems. Before locking-in the rules for the program, NYSERDA is asking stakeholders whether the eligibility criteria, incentives, proposal requirements, and required deliverables would encourage you to propose or if the rules are too onerous to be of interest to you.</p>	<p>NYSERDA invites feedback if there are aspects of the draft solicitation that would cause an otherwise good project to not be able to participate – NYSERDA will give thoughtful consideration to feedback and might make tweaks to the solicitation so as to make it more accommodating.</p>

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Land and building resources	I live in the city of Minneapolis where the city is laid out to include alleyways for access to garages. Do you think the alleyways would be good candidates as "real estate" for bore holes?	Any given proposal will need to assess on a case-by-case basis the extent to which there might be other infrastructure underground along such alleyways that could complicate the use of that real estate for bore holes (such as electric, gas, water, sewer, subways).	
	Is there any generic building(s) data (e.g. heating and cooling profile) that can be provided to help shape a possible solution?	There are simulation tools, such as DOE2, that might be useful. There is a Columbia University database that indicates thermal loads of buildings in New York City https://qsel.columbia.edu/project-nyc-energy-mapping/ https://qsel.columbia.edu/assets/uploads/blog/2018/publications/Spatial-Distribution-of-Urban-Building-Energy-Consumption-by-End-Use.pdf	
	Wellfield is a big environmental permit concern in NYC - better call it a GHX (Ground heat exchanger). What depths are we talking about (shallow, medium, to deep)? Open or closed GHX? Or, is it all of the above...	NYSERDA encourages stakeholders to conceive of project configurations that, upon validation supported through the solicitation, have the potential to lower costs or increase performance for subsequent replications and can be widely replicated in New York State. Proposers should provide compelling information to indicate that their project concepts are well-conceived for construction and operation, including their choice depths and styles of GHX (if pursuing a ground-source-type system).	
	Are you expecting ATES project too?	NYSERDA encourages stakeholders to conceive of project configurations that, upon validation supported through the solicitation, have the potential to lower costs for subsequent replications and can be widely replicated in New York State.	

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		Proposers should provide compelling information to indicate that their project concepts are well-conceived for construction and operation, including their choice and styles of thermal energy storage or lack thereof.	
	I suggest using the term "bore holes" rather than "wells". Wells implies that you are using well water (which many will object to). Bore holes is a better term when referring to geothermal closed vertical loops.	Thank you for this good clarification.	
	What permitting is required to use NY public waterways (rivers, lakes) as heat sources/sinks and will NYSERDA facilitate or streamline this process for the program?	The intent of the solicitation is to pioneer these kinds of discussions so as to simplify the process for follow-on replicable projects. It would be appropriate for a proposer to have exploratory conversations with such a key agency prior to submitting a proposal to the solicitation, so that the proposal can offer an informed and likely solution. If needed, NYSERDA can act as convener to bring parties together for a dialog, and NYSERDA would look to the proposer to be the champion for advocating to a streamlining.	
	Administrative issues of land use, establishment of right of ways and many other local jurisdiction specific principles and practices is extremely important and can be used by opponents to torpedo a project. Wouldn't this be an endeavor that an Albany Law School and the equivalent	NYSERDA invites proposers to conceive of projects to help reduce these hurdles. Depending on the proposer's vantage point, such a project could seek to pioneer a solution wrapped around a site-specific project development (Category A/B/C), or such a project could seek to pioneer a solution via a Category D Best Practices Study that could be pursued for example by an appropriate institution of higher education.	

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	institution in all states pursue to facilitate development of projects?		
Program tracking	Will the information and proposals submitted to you be made public? It would be good to see what the market is seeing as opportunities beyond just the projects that ultimately get the incentives.	NYSERDA does not normally disseminate proposals received, regardless of whether selected for award or not. NYSERDA intends to provide as much transparency as possible to assist market actors with understanding trends and opportunities, while being sensitive to proprietary business content.	
	How can utilities like National Grid be helpful/supportive in the PON? Will the data/findings be shared with the utilities as the utilities continue to explore district geothermal for their customers and communities?	<p>While promoting the utility-administered heat pump incentives, utilities can assist NYSERDA with outreach to prospective anchor customers (for example, college campuses, medical campuses, housing complexes) to inform them of the availability of the NYSERDA solicitation in particular the Category A Scoping Studies for comparing/contrasting individual-building-heat-pump configuration versus the campus-wide community-style-heat-pump configuration.</p> <p>NYSERDA intends to provide as much transparency as possible to assist market actors with understanding trends and opportunities, while being sensitive to proprietary business content. NYSERDA and the utilities can connect on this topic at regularly-recurring intervals, perhaps via the NYS Clean Heat Program Joint Management Committee meetings or otherwise.</p>	NYSERDA invites feedback if there are mechanisms for partnering with utilities that can be impactful – the utility/NYSERDA interaction and the utility/NYSERDA/stakeholder interaction.
Selection preferences/eligibility	Is there a hierarchy in your rating system for the heat sink/source type? Second part of question:	No. The solicitation encourages proposers to consider solutions that are likely to be more cost-effective, energy	

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	i.e. closed loop vertical bore or waste water treatment effluent?	efficient, and replicable than similar solutions configured as single-building-heat-pump deployments.	
	Are there minimum efficiencies or COP's that will need to be required each of the projects?	No. Projects with higher COPs are likely to have better economics and would seem more-attractive for demonstrating opportunities to grow the market to scale. The Community Heat Pump Systems solicitation will be a competition, and more-attractive projects are likely to score better during the competitive review process.	
	Can NYSERDA funds be used to study the financial and legal aspects of establishing a new entity such as a thermal utility that would own and operate the system? If so, can this be done in Category A Scoping Studies or Category B Detailed Design Studies?	<p>Yes. In both Category A and Category B projects, as part of the project final report deliverable, each study must discuss their findings regarding applicable business model (the draft solicitation at Category A and at Category B says "Discuss regulatory/legal/environmental suitability, including permitting and franchising").</p> <p>This issue should be addressed in both a Category A study as well as a follow-on Category B study, with a more-detailed drill-down (and therefore a greater budget amount devoted to it) in Category B activities.</p>	
	How is NYSERDA prioritizing these projects? What rubric(s) are being used to determine which projects will receive incentives?	<p>In the draft solicitation, each category of project has its own section regarding Evaluation Criteria. Please see the applicable sections of the draft solicitation posted here www.nyserda.ny.gov/district-thermal-systems and if you have further questions please contact Dana Levy.</p> <p>Generally speaking, the biggest impact that this program can make on the marketplace would be to fund a portfolio of diverse pilot project configurations that, upon validation supported through the solicitation, have the potential to lower</p>	

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Topic	Question	Answer	Invitation to provide feedback on any topic and especially on those in this column
	Are there any restrictions to fuels switched from (such as with the LMI heat pump adder gas restriction)?	costs and increase performance for subsequent replications and can be widely replicated in New York State. The Community Heat Pump Systems solicitation requires a focus on decarbonization of comfort space heating of occupied spaces of buildings. For example, switching from electric resistance heating to electric-driven heat pump heating, although a noble energy efficiency gain that should be considered, would not demonstrate a barrier-busting approach to building electrification/building decarbonization and therefore is not eligible for funding under the Community Heat Pump Systems solicitation.	
	I assume a higher Ed campus comprised of 4 buildings and totaling 400,000 with an existing hot water distribution system fed by natural gas boilers would be replicable and suitable for this. Correct?	There are a plethora of higher education campuses in New York State. It will be incumbent upon a proposer to provide compelling information to show that the design basis for a solution at any given campus as proposed could be highly replicable at other campuses.	
Subsequent opportunities	Will there be a subsequent solicitation that is not so focused on heat pumps (but rather on other innovative and sustainable cooling/heating solutions)?	Besides the current round (#5) of the NextGen HVAC Innovation Challenges (PON 3519) with concept papers due Nov 17, 2020 3pm EST, two additional rounds are planned. Rounds 6 & 7 are expected to be issued in 2021 and 2022 respectively. Areas of interests in past and current rounds have focused on cold climate heat pumps, geothermal, HVAC controls, compressorless HVAC, thermal distribution, energy pods, refrigerants, thermal storage, and building envelope solutions. NYSERDA will continue to identify areas of needed innovation and add, delete or modify the issued challenges.	NYSERDA invites feedback if there are specific market growth challenges that might benefit from a strategic approach conducted by NYSERDA.

Q&A from Zoom Meeting webinar in partnership with IDEA and NYGB regarding NYSERDA's draft solicitation for Community Heat Pump Systems:
<https://www.districtenergy.org/events/event-description?CalendarEventKey=e25b0147-fc29-4310-a710-22cf14a3690d&Home=%2fevents%2fwebinars>

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		<p>https://portal.nyserda.ny.gov/CORE_Solicitation_Detail_Page?SolicitationId=a0rt0000006nDncAAE</p> <p>As projects materialize via the Community Heat Pump Systems solicitation, NYSERDA will engage with stakeholders to assess the learnings from the portfolio of projects and strategize for follow-on activities that NYSERDA could possibly take or that NYSERDA could possibly encourage others to take, aimed at reducing hurdles and thereby reducing costs for the remaining stubborn challenges associated with building electrification/building decarbonization.</p>	

Q&A regarding New York Green Bank: Zoom Meeting webinar in partnership with IDEA and NYSERDA <https://www.districtenergy.org/events/event-description?CalendarEventKey=e25b0147-fc29-4310-a710-22cf14a3690d&Home=%2fevents%2fwebinars>

For further inquiries with NY Green Bank: Email to Caroline.Dunn@nygb.ny.gov Telephone NYGB at (212) 379-6260

Topic	Question	Answer
NYGB	Can New York Green Bank comment on the Special Purpose Vehicle (SPV) and the three year of financials?	As an investor in structured finance, we require a SPV be created to be our borrower. The purposed of the request for three years of financials from the Sponsor is to diligence the financial health of the entity responsible for managing the project's development, construction, and/or operation.
	In my experience, regulatory barriers and inflexible engineering standards are a concern. Is a regulatory assessment required in the NYGB's due diligence? If so does NYSERDA carry that out?	The need for a regulatory assessment is determined by evaluating the characteristics of each project. If required, the assessment would be performed by an independent third-party. However, NYGB does work with its colleagues at NYSERDA on each transaction to leverage their knowledge of the market and regulations.