New York Standard Approach for Estimating Energy Savings from Energy Efficiency Programs –

Residential, Multi-Family, and Commercial/Industrial Measures

Technical Resource Manual Management Plan

Version 13.1

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Version History and Description of Revisions: Technical Resource Manual Management Plan

Date Update	Version	Section	Description of Change	Page Number
8/13/2025	13.1	Introduction	Language was added and historical references commission orders were removed.	5-6
8/13/2025	13.1	Overview	Reference to EE/BE order and Strategic Framework alignment was added.	6
8/13/2025	13.1	Organization Structure	Language was clarified and added. Allocated Cost Share Percentage (2026-2030) was added to the TRM MC Cost Allocation Table, which will be determined during the next filing of the TRM Management Plan.	8-9
8/13/2025	13.1	Roles and Responsibilities	DPS Staff's roles and responsibilities were added. Language was further clarified for each of the roles. Roles and Responsibilities and the Administrative Support appendix was integrated into this section.	9-13
8/13/2025	13.1	TRM Administrative Details	Added subsections "Annual Consolidated Filing", "Five-year Measure Review Protocol", "Management Plan", "Strategic	16-18

			Framework", and "Review Process"	
8/13/2025	13.1	Strategic Framework	Added language that states all new measures will receive an initial classification based on the strategic framework.	16
8/13/2025	13.1	Review Process	Added language that DPS will work with the MC for developing front-end quarterly workplans.	17
8/13/2025	13.1	Review Process	Added language that details DPS's veto power.	17
8/13/2025	13.1	Review Process	Meeting attendance quorum added.	18
8/13/2025	13.1	Vote Process	Added language that restricts abstain votes to only organizations that are prohibited from offering a certain measure.	20
8/13/2025	13.1	Detailed Workplan	Added language that says the workplan will include both the EUL, strategic classification, and reason for strategic classification.	24

I. Introduction

The Joint Utilities,[1] the Long Island Power Authority ("LIPA"),[2] and the New York State Energy Research and Development Authority ("NYSERDA"),[3] as members of the Technical Resource Manual ("TRM")[4] Management Committee ("TRM MC"),[5] hereby submit the updated TRM Management Plan. This submission is made in accordance with directives from multiple orders[6] issued by the New York State Public Service Commission ("Commission").

The primary purpose of the TRM is to provide a standardized, accurate, fair, and transparent approach for estimating energy and demand savings across New York State's energy efficiency programs. To do so, the TRM provides standardized methods, assumptions, default values, and expected effective useful lifetimes ("EULs") of common energy efficiency measures to support statewide consistency in annual and lifetime energy savings estimates.[7] The TRM Management Plan presented herein addresses the ongoing methodology and practices of the TRM MC to maintain and update the TRM. Beginning in 2026, the TRM will include measure categorizations based on the Strategic Framework outlined in the 2025 Non-LMI EE/BE Order and the 2025 LMI EE/BE Order ("2025 EE/BE Orders").

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[1] Central Hudson Gas & Electric Corporation ("Central Hudson"), Consolidated Edison Company of New York, Inc. ("Con Edison"), KeySpan Gas East Corporation d/b/a National Grid ("KEDLI"), The Brooklyn Union Gas Company d/b/a National Grid NY ("KEDNY"), National Fuel Gas Distribution Corporation ("National Fuel"), New York State Electric & Gas Corporation ("NYSEG"), Niagara Mohawk Power Corporation d/b/a National Grid ("NMPC"), Orange and Rockland Utilities, Inc. ("O&R"), and Rochester Gas and Electric Corporation ("RG&E") (collectively, "Joint Utilities") .

[2] Long Island Electric Utility Servco LLC, as agent of and acting on behalf of Long Island Lighting Company d/b/a LIPA ("LIPA"), was added to the TRM Management Committee in 2016

[3] Case 14-M-0094 – September 2021 Order, at ordering clause 5, on pages 88-92.

[4] Known formally as New York Standard Approach for Estimating Energy Savings from Energy Efficiency Programs - Residential, Multi-Family, and Commercial/Industrial

[5] The TRM Management Committee consists of representatives from each of the TRM Member Organizations to support the maintenance of a New York State TRM.

[6] Case 14-M-0101 – *Proceeding on Motion of the Commission in Regard to Reforming the Energy Vision* ("REV Proceeding"), Order Adopting Regulatory Policy Framework and Implementation Plan (issued and effective February 26, 2015); Case 15-M-0252 – *In the Matter of Utility Energy Efficiency Programs,* Order Authorizing Utility-Administered Energy Efficiency Portfolio Budgets and Targets for 2016-2018 (issued and effective January 22, 2016); Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative ("EE/BE Proceeding"), Order Authorizing Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030 ("2025 Non-LMI EE/BE Order") (issued May 15, 2025); Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative ("EE/BE Proceeding"), Order Authorizing Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030 ("2025 LMI EE/BE Order") (issued May 15, 2025).

[7] The TRM is not intended to measure net energy and net demand savings (i.e., savings that have been adjusted based on completed evaluation study results, incorporating adjustments such as free ridership, spillover, market effects, user and tenant behavior, etc.). The TRM is also not intended to encompass all possible scenarios, nor should it be construed as an exclusive or limiting implementation document. Rather, it serves as a guidance framework based on the most common and anticipated applications.

There have been multiple Orders issued by the Commission that addresses the TRM. These orders can be found on the Department of Public Service ("DPS") Document and Matter Management system ("DMM") with specific TRM related documentation found in Matter 15-01319.[8] Most recently the 2025 EE/BE Orders directed the TRM MC to examine foundational tools like the TRM to ensure they evolve to meet the needs of the energy efficiency and building electrification (EE/BE) portfolios in the 2026–2030 period, and to file an updated TRM Management Plan addressing items identified in the 2025 EE/BE Orders.

II. Overview

The TRM Management Plan describes the overall process used to maintain and update the TRM, as described in greater detail herein. This process accommodates a variety of inputs, including but not limited to: (1) impact evaluation findings or focused Measurement and Verification ("M&V") analyses relevant to savings algorithms; (2) applicability and impact to ratepayer funded (EE/BE) portfolios, including adhering to the strategic framework outlined in the 2025 EE/BE Orders; (3) studies documenting emerging and developing technology; (4) updates to federal, state, or industry standards and energy conservation codes; and (5) demand savings assumptions.

The TRM will continue to evolve over time and will incorporate various inputs, some of which are currently not known. The complexity of some of the inputs may require further analysis to be understood and appropriately integrated into the TRM. Additionally, there may be a need to engage specialized industry expertise to aid in such understanding and integration. The TRM MC will leverage Evaluation, Measurement, and Verification ("EM&V") studies or focused M&V analyses at any of the following levels: technology or measure level, program level,

[8] Matter 15-01319 – *In the Matter of the New York State Technical Resource Manual.*

portfolio level, and/or statewide level. TRM revisions will make use of relevant EM&V impact study findings or detailed impact M&V analyses.

The TRM MC is committed to ensuring transparency in all updates to the TRM. This is achieved through the release of revision records, summaries of changes within updated documents, and annual consolidated filings, all of which are made accessible to stakeholders via DMM.

III. Organizational Structure

The Department of Public Service Staff ("DPS Staff") provides direct oversight of the TRM MC and subsequent workstreams.

The TRM MC includes Management Committee ("MC") Voting Members, MC Members, and an MC Treasurer. The organizations that make up the TRM MC are known as the MC Member Organization. Each MC Member Organization appoints a lead representative, known as the MC Voting Member, who is responsible for managing their organization's participation in TRM MC activities and serves as the designated Voting Member for their entity. While the TRM MC is governed collectively by the participating utilities, it elects Co-Chairs to lead the committee. The role of MC Treasurer is also filled by representatives from the MC Member Organizations.

The Administrative Vendor is an external contractor appointed by the TRM MC to provide administrative and technical support for the maintenance of the TRM. The Administrative Vendor occupies the roles of MC Secretary and Technical Editor.

Further details on roles and responsibilities are outlined in Section IV of this document.

<u>Voting</u>

The TRM MC collaboratively reviews all proposed updates to both the TRM and the TRM Management Plan. Following the review, each TRM MC Voting Member casts a vote to approve or reject the proposed revisions. There are a total of eight votes, with Con Edison, Central Hudson, National Fuel, National Grid, NYSEG/RG&E, O&R, LIPA, and NYSERDA—each representing a single vote. The procedures governing the voting process are further detailed in Section VI(C).

Funding

The TRM MC collectively shares the cost associated with maintaining and updating the TRM. Through a collaborative negotiation process, The TRM MC has agreed upon fixed cost-share percentages for contracting purposes, as outlined in Table 1 below.

The 2021-2025 cost-sharing percentages were calculated based on each MC Member Organization's average annual non-Low- to Moderate-Income ("non-LMI") energy efficiency budget. Each organization's share was determined by dividing its individual average budget by the total combined average budgets of all MC Member Organizations for the same period. Central Hudson, Con Edison, National Fuel, National Grid, NYSEG, RG&E, and O&R applied the budget numbers found in the 2020 NE: NY Order.[9] LIPA shared their energy efficiency budgets for 2021–2025. NYSERDA's budget numbers were developed from their Clean Energy Fund Market Development budget which is $1.9 billion, rounded up to $2 billion to support energy efficiency over a ten-year period, averaging $200 million per year.

Similarly, the 2026–2030 cost sharing percentages were based on each MC Member Organization's average annual non-LMI energy efficiency budgets and calculated in the same manner as the 2021–2025 cost-sharing percentages. All the MC Member Organizations budget information was pulled from the Appendix D of the Non-LMI EE/BE Order,[10] except for LIPA; LIPA's 2026–2030 non-LMI energy efficiency budget was factored in to determine the final cost share percentages.

These cost-share percentages will be applied to the TRM Administrative Vendor invoices, which are approved for payment as support work is completed. The TRM MC contracts with the TRM Administrative Vendor to assist with the administrative duties and technical edits associated with

[9] Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative ("NENY Proceeding"), Order Authorizing Utility Energy Efficiency and Building Electrification Portfolios Through 2025 ("2020 NENY Order") (issued January 16, 2020).
[10] 2025 Non-LMI EE/BE Order, Appendix D, pp. 1-2

the maintenance of the TRM. The TRM Administrative Vendor includes the roles of the MC Secretary and Technical Editor further detailed in Section IV. To the extent that the TRM MC incurs costs associated with: (1) obtaining administrative support, or (2) maintaining and updating the TRM, the following percentages will be utilized:

Table 1: TRM MC Cost Allocations

Management Committee Member Organization	Allocated Cost Share Percentage (2021-2025)[11]	Allocated Cost Share Percentage (2026-2030)[12]
Central Hudson	2%	4%
Con Edison	34%	41%
LIPA	8%	7%
National Fuel	2%	1%
National Grid	20%	22%
NYSEG	7%	7%
O&R	2%	3%
RG&E	3%	3%
NYSERDA	22%	12%

To the extent that the TRM MC identifies a need to switch cost methodologies or make further adjustments to individual cost shares resulting from new contract negotiations for TRM Administrative Vendor support, the TRM MC will revise the TRM Management Plan accordingly and file the updated TRM Management Plan with the Commission.[13]

[11] Allocated Cost Share Percentages will be used up until December 31, 2025
[12] Allocated Cost Share Percentages will be used beginning January 1, 2026
[13] Under extenuating circumstances, the fixed cost share percentages may be adjusted temporarily, if all TRM MC members agree and the decision is documented with a vote.

IV. Roles and Responsibilities

DPS Staff

DPS Staff provides direct oversight to the TRM MC and subsequent workstreams.[14] This oversight role includes ensuring the TRM is serving its intended purpose and prioritizing work so that resources of the TRM MC and DPS Staff are being used most efficiently.

Specifically, in the 2025 EE/BE Orders, the Commission directed DPS Staff to:

(1) work with the TRM Management Committee on the front-end of the review process to determine what measure revision(s), addition(s), correction(s), or removal(s) should be considered.

(2) have the ability to veto any measure revision(s), addition(s), correction(s), or removal(s) that pass through the TRM Management Committee submittal process for which DPS Staff has remaining concerns.

(3) assess the current form and function of the TRM Management Committee and initiate additional adjustments, as necessary, to streamline work and focus on aspects that will be necessary for the 2026-2030 EE/BE portfolios.

(4) work with the TRM Management Committee to categorize all measures currently in the TRM, and determine which are Strategic, Non-Strategic, and Neutral such that, no further investment of time and resources should be made on Non-Strategic measures.[15]

DPS Staff provide this oversight function through a variety of means which include but are not limited to regular meetings with the TRM MC and/or its Co-Chairs, prioritization of workstreams, agenda setting, and monitoring deliverables.

MC Voting Members

Each MC Member Organization designates one individual to serve as its Voting Member on the TRM MC. Voting Members are responsible for reviewing and providing edits, comments, and/or concurrence on all documents circulated by the TRM MC. These documents may include the TRM

[14] 2025 Non-LMI EE/BE Order, pp. 135.
[15] 2025 Non-LMI EE/BE Order, pp. 136.

Management Plan, workplan, measure revisions, new measure proposals, consolidated filings, and external correspondence with market participants and stakeholders.

Voting Members are also responsible for casting votes on behalf of their respective organizations concerning proposed edits to the TRM and other official TRM MC decisions. If a Voting Member is unavailable, another representative from the same organization may assume voting responsibilities. The voting process is outlined in the Section V(C). Additionally, in the event of any changes to Voting Members, the TRM MC must be notified to ensure the documentation is updated accordingly. Voting Members are expected to participate in weekly TRM MC meetings and serve as liaison between the TRM MC and their respective organizations. They are encouraged to communicate TRM updates internally, gather feedback, and facilitate organizational input. Furthermore, Voting Members should identify and engage relevant subject matter experts ("SMEs") as needed to support discussions and decision-making.

MC Members

MC Member Organizations can elect to have any number of representatives sit on the TRM MC. MC Members are expected to actively engage in weekly TRM MC meetings and contribute to discussions related to the TRM. They may also contribute to reviewing and editing the TRM and associated documentation.

To ensure comprehensive input, MC Member Organizations are encouraged to include experts from their evaluation teams. This facilitates the incorporation of all relevant measure updates identified through evaluation studies. TRM MC Members will identify and add relevant evaluation studies to an evaluation tracker on a quarterly basis. The directory of evaluation studies is hosted on DMM under the matter number 16-02180.[16] Additionally, MC Member Organizations should consider including staff from key functional areas such as program implementation, engineering, and data systems to support well-rounded contributions to the TRM.

[16] In the Matter of Clean Energy Program Evaluation, Measurement and Verification – Matter Number 16-02180.

MC Co-Chairs

Two Co-Chairs from the TRM MC are elected to serve a term of twelve months, commencing May 1 and concluding April 30.[17] Elections for both Co-Chair positions are held annually in April. The Co-Chairs are responsible for establishing the weekly meeting schedule, facilitating meetings, prioritizing workloads, overseeing all TRM MC activities, and ensuring that TRM MC deliverables are met.

Additionally, the Co-Chairs collaborate with the Technical Editor and Secretary to coordinate meeting logistics and support effective meeting facilitation. Meetings beyond the established weekly schedule may be convened as necessary. The Co-Chairs may serve as the primary representatives of the TRM MC in external communications and assist in organizing annual stakeholder forums. Within the organizational structure, the Co-Chairs may appoint designees or request assistance from members of the TRM MC to complete specific detailed tasks. In the event that a Co-Chair resigns, they may appoint a representative from their organization to serve the remainder of the term.

MC Treasurer

The MC Treasurer is elected to serve a term of twelve months, commencing May 1 and concluding April 30.[18] The election is held annually in April. The MC Treasurer supports the TRM MC in managing its budgeting processes. Specifically, the MC Treasurer assists with the procurement, financial oversight and billing activities related to the TRM Administrative Vendor contract. These responsibilities are carried out in accordance with the cost-sharing framework outlined in Section III.

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[17] Any TRM MC member from any TRM MC organization can serve as Co-chair. Co-chairs are not prohibited from serving multiple consecutive terms, with the TRM MC's consensus. After the conclusion of a twelve-month term, the TRM MC reserves the right to identify new Co-Chairs or continue operating with the existing Co-Chairs. To the extent agreement is not reached in selecting new Co-Chairs, the existing Co-Chairs may choose to continue to serve for the next twelve-month term. After the completion of a consecutive two-year term, a new Co-Chair should be selected.

[18] Any TRM MC member from any TRM MC organization can serve as MC Treasurer. MC Treasurers are not prohibited from serving multiple consecutive terms, with the TRM MC's consensus. After the conclusion of a twelve-month term, the TRM MC reserves the right to identify a new MC Treasurer or continue operating with the existing MC Treasurer. To the extent agreement is not reached in selecting a MC Treasurer, the existing MC Treasurer may choose to continue to serve for the next twelve-month term. After the completion of a consecutive two-year term, a new MC Treasurer should be selected.

MC Secretary

The MC Secretary is appointed by the TRM MC under the TRM Administrative Vendor contract. They are responsible for general administrative work including agenda planning, scheduling meetings, logging meeting minutes, documenting measure prioritization in the workplan, facilitating communications, and other ad hoc assignments as directed by the TRM MC.

The MC Secretary supports the TRM MC to ensure the most current versions of the TRM and associated resources are publicly posted. This may include coordinating with DPS Staff to have a document posted on the New York State ("NYS") TRM website, preparing filings for upload to the DMM, and issuing notifications to the TRM MC, Staff, and TRM stakeholders. All such activities are conducted under the direction of the TRM MC.

In addition, the Secretary coordinates both internal and external communications and assists in planning and promoting the annual TRM Stakeholder Forum.

The MC Secretary maintains a workplan that tracks planned TRM revision activity and prioritizes measures for future review, in alignment with the prioritization framework agreed upon by the TRM MC. This workplan will track who has submitted the measure or item selected for review. The MC Secretary is responsible for documenting consensus and voting results amongst the TRM MC on all changes to the TRM and for providing a secure method for sharing electronic documents with TRM MC members.

Technical Editor

The Technical Editor is appointed by the TRM MC under the TRM Administrative Vendor contract and provides technical support for measure revisions and the development of new measures. This includes reviewing EM&V studies and technical literature, researching new and updated codes and standards, and integrating approved changes to the TRM during a given review cycle.

Once redlined changes are approved by the TRM MC, the Editor incorporates them into the TRM. This may involve updating engineering algorithms, technical descriptions, page number alignment, table of contents, footnotes, appendices, and overall document formatting. All revisions are documented using a standardized format that includes the measure name, revision number, issue and effective dates, a description of the change, and the relevant page number.

The Technical Editor facilitates review calls with the TRM MC, DPS Staff, and stakeholders to summarize redlines, address comments, and identify measures for future revision. At the direction of the TRM MC, they also perform code and standards reviews and propose redlines for consideration.

In addition to maintaining technical accuracy, the Technical Editor may recommend ways to streamline or standardize the TRM document.

V. TRM Administrative Details

A. Cyclical Filing Schedule

The TRM MC operates on a quarterly basis to file updates that reflect new information, methodologies, or revisions and additions to the TRM. These quarterly updates are then consolidated into an annual TRM release. In addition, all measures in the TRM will be reviewed at least once every five years to ensure their continued accuracy and relevance to EE/BE portfolios. The TRM MC also maintains a list of prioritized measures to aid quarterly work planning.[19] More information about this process is outlined below.

1. Quarterly Record of Revision Filings

The TRM MC will file a quarterly Record of Revisions ("RORs") documenting any additions or revisions to TRM measures reviewed during each quarter. These quarterly filings will include a comprehensive list of all measures that were updated and approved, along with the effective dates for each change. Additionally, the RORs will be publicly posted on the New York State TRM website[20] following each quarter.

2. Annual Consolidated Filing

An annual filing will consolidate TRM changes from the previous twelve months' ROR filings. Aside from compiling the records of revisions and reflecting codes & standards updates, the

[19] The TRM MC may exclude measures from the list of prioritized measures based on future standards, codes, or policies that will phase-out that measure.

[20] https://dps.ny.gov/technical-resource-manual-trm

consolidated filing should mostly concentrate on cosmetics and user experience. Substantive changes should be reserved for quarterly records of revision. The document is submitted in July of each year. A representative example of a typical cyclical filing schedule is included as Appendix A to this filing. The cyclical filing schedule will document the filing schedule for record of revisions and the annual update. When the TRM MC deviates from the typical cyclical filing schedule by more than 2 weeks, an extension notification with the revised filing date will be filed in DMM.

3. Five-year Measure Review Protocol

To ensure continued accuracy and relevance to EE/BE Portfolios, all measures included in the TRM will be reviewed at least once every five years. The TRM MC tracks the last update date for each measure through quarterly workplans. If a measure has not been updated within a five-year period, it will be added to an upcoming quarterly workplan for review. Any updates resulting from this five-year review process will be included in the corresponding quarterly ROR filings.

4. TRM Management Plan

The TRM MC supports a continuous improvement process for updating both the TRM and the governance structure of the TRM MC itself. This process is designed to ensure responsiveness to Commission policy and directives, changing EE/BE portfolios, evolving technologies and market conditions. Any substantive changes to the TRM or its management approach will be documented in a revised TRM Management Plan. This updated TRM Management Plan will be jointly filed at least once annually, in coordination with the consolidated annual TRM filing.

5. Filing Process

MC Member Organizations take turns filing quarterly revisions and consolidated filings based on a rotating schedule. The MC Secretary will assist the filing MC Member Organization with scheduling and packaging filing documents. In the case of a notification to stakeholders regarding a revised filing date, a letter outlining the details of the revised filing date should be addressed to the DPS Director of the Office of Markets and Innovation and filed as Correspondence on the

DMM[21] under matter number 15-01319. When the TRM MC is filing in accordance with a Public Service Commission Order, filing documents should be accompanied by a letter addressed to the DPS Secretary to the Commission and filed as Reports on the DMM under matter number 15-01319.

B. Addition/Change Process

The TRM MC has established a functional workflow process to outline how submittals for new measures or revisions to existing measures in the TRM, are reviewed and advanced through the TRM MC. A detailed overview of this functional workflow process is included as Appendix D "TRM MC-Addition/Change Process" and is posted to the NYS TRM website.[22]

Submittals may be prepared by MC Member Organizations or by non-TRM MC entities, both following the same standardized workflow process.[23] Proposed new measures and revisions may be submitted at any time during the calendar year. Submitted measures will then be considered by the TRM MC on a continuous basis in accordance with the functional workflow process.

1. Strategic Framework

Per the Commission's directive in the 2025 EE/BE Orders, DPS Staff will work with the TRM MC to categorize all measures currently in the TRM (V.12) according to the Strategic Framework's Strategic, Non-Strategic and Neutral designations. The TRM MC will apply this framework to its review process for both new measure submittals and revisions to existing measures. Each measure categorization will be proposed by the TRM MC and confirmed by DPS Staff. As outlined in the 2025 EE/BE Orders, "[no further investment of time and resources should be made on any Non-Strategic measures."[24]

Measures designated as Non-Strategic will not be eligible for inclusion in the TRM or for further review unless they are determined Strategic or Neutral in conditional applications, as outlined in

[21] https://documents.dps.ny.gov/public/Common/AdvanceSearch.aspx
[22] http://www3.dps.ny.gov/W/PSCWeb.nsf/All/72C23DECFF52920A85257F1100671BDD?OpenDocument
[23] The term "entity" is not restrictive – this could include utilities, Staff, NYSERDA, technology providers, stakeholders, or any other entity not specified that is working on a submittal. The TRM MC also recognizes that multiple entities may be working together on a submittal.
[24] 2025 Non-LMI EE/BE Order, pp. 136.

the 2025 EE/BE Orders. However, the TRM MC and DPS Staff may revisit and reassess the strategic categorization of measures during the revision process to ensure alignment with Commission policy and directives, evolving EE/BE portfolios and market dynamics.

2. Review Process

The TRM MC operates on a structured quarterly review cycle to evaluate and approve additions and revisions to the TRM. To be considered for inclusion in each quarter's workplan, measures must be submitted no later than 10 business days before the start of the quarter.

Following the submission deadline, the Technical Editor compiles the proposed measures into a batch and prepares the quarterly workplan. This workplan outlines the measures for review, along with the associated tasks and timelines. Once this workplan has been drafted, the Technical Editor presents it to DPS Staff and the TRM MC for initial review.

DPS Staff will work with the TRM MC to determine what measure(s) should be considered and prioritized for the quarterly review process. The workplan will also account for the applicability to 2025 EE/BE portfolios and alignment with the Strategic Framework. This process also extends to existing measures, changing their categorization under the Strategic Framework. All items must receive unanimous consent from all TRM MC members before they can proceed to receive a full review. Once approved, the TRM Secretary records the decision, and the initial revision process begins. At any point during the review process before filing, DPS Staff may veto a measure for which DPS Staff has remaining concerns. The TRM MC and DPS Staff will meet following the veto to determine the issue with the measure. The measure may require modifications for a future record of revision, or it may be determined to be ineligible for inclusion in the TRM.

Once measures receive approval to proceed to full review, draft versions are distributed to all TRM MC Member Organizations. The total review process typically spans at least eight weeks, during which, the TRM MC, under the oversight of DPS Staff, is allotted four weeks to provide comments on the initial revisions. Specific start dates for each review cycle are tracked and updated by the MC Secretary within the detailed workplan. TRM MC members are expected to provide their comments, edits, and feedback directly into the shared measure draft documents. Although some

MC Member Organizations may conditionally abstain from voting, they are encouraged to evaluate the technical merit of the submittal to the greatest feasible degree. The Technical Editor will schedule two calls with the TRM MC, DPS Staff, and relevant stakeholders to discuss review comments. Each MC Member Organization must have at least one attending representative present during these calls. If an organization is unable to attend a call, it is their responsibility to review the meeting minutes and communicate any relevant feedback to the TRM MC. If more than half of the organizations are not present, the call will be postponed and rescheduled.

After the review process has been completed with participation from the TRM MC, each measure proceeds to a vote. The designated Voting Member from each of the MC Member Organizations will cast a vote on behalf of their respective company. Each Voting Member is allowed one vote - yes, no, or abstain. Measures must receive unanimous consent from all Voting Members to advance. Further details on voting procedures are described below in Section C.

Special situations may arise such as when the TRM is out of compliance with codes, standards, or orders. In these circumstances, measures deemed time-sensitive or high-priority will receive an expedited review and filing timeline. It should be noted that new technologies and new market innovations will also be accommodated within this workflow. However, the timelines for these submittals will be discussed and established during TRM MC meetings. The TRM MC reserves the right to accelerate or temporarily postpone the review of submittals, as necessary. In addition, the TRM MC may elect to postpone the review of a submittal when appropriate (e.g., if additional information has been requested or if consultation with technical expertise is deemed necessary).

3. Correction Process

Corrections consist of small edits that fix typos, erroneous information, outdated references, and broken internet links. The correction process seeks to bring the measure into alignment with original intent and not add information or modify the existing method. As needed, the TRM MC will file a record of corrections during a review cycle that identifies corrections in the TRM. Corrections do not require the stringency of the quarterly review process and go into effect upon publication of the corrections document. The TRM MC will incorporate the identified corrections into the following ROR.

The TRM MC will apply the correction process for updating any measure categorization changes under the Strategic Framework

Appendix D illustrates the corrections process.

C. Voting Process

The voting process is based on the technical merit of the submittal being considered. Votes cast by MC Voting Members are defined below:

- "YES" – defined as no technical issues with the submittal being presented based on the best available information known by the TRM MC.

- "NO" – defined as having unresolved technical issues or unanswered questions in a submittal. It is intended to support a consensus-based process and prompts further discussion during or between TRM MC meetings.

    - Voting Members who cast a "NO" vote must provide written comments explaining their reasoning. These are recorded by the TRM MC Secretary.
    - The submitting party is responsible for addressing outstanding technical concerns or questions by the TRM MC and for notifying the TRM MC if the submittal should be withdrawn.
    - "NO" votes can be changed to "YES" following additional discussion or new information. If no action is taken within two months, TRM MC Member Organizations may nullify the submittal. Any future presentation of the measure would require a new submittal.
    - Reasons for a nullified submittal will be documented in the quarterly record of revision filings to ensure transparency.[25]

[25] Rather than filing exhaustive meeting notes from each of these discussions, the TRM MC will summarize reasons for nullified submittals within the quarterly record of revision filings, for transparency purposes.

- "ABSTAIN" – defined as a vote that does not necessarily stop the TRM MC's consensus process from moving forward.
    - Only TRM MC Member Organizations that are prohibited from offering a particular measure (i.e. gas only utilities regarding measures that have electric only energy savings) may abstain from voting on that specific measure.
    - The reason a TRM MC member is electing an "ABSTAIN" vote must be provided: (1) during the voting process, or (2) during discussions at TRM MC meetings.
    - These reasons will be documented in TRM MC voting spreadsheets.

A resubmittal is required when a proposed measure addition or revision receives a "NO" vote from the TRM MC. A postponement occurs when the TRM MC determines that further research or supporting documentation is needed before a decision can be made. In both cases, the TRM MC will communicate to the submitting party the reason behind the postponement or resubmittal.

Resubmitted measures will be reconsidered for inclusion in the TRM in accordance with the voting procedures outlined in Section III. Postponed measures may be included in a future workplan, with their timing and reconsideration left to the discretion of the TRM MC. The TRM MC voting process only considers the technical accuracy and relevance to EE/BE portfolios of submittals being presented. If a measure or technology is included in the TRM, it does not mean that it is supported or expressly endorsed by the member companies of the TRM MC (*e.g.*, for gas-only utilities, non-gas measures or technologies may never be supported or expressly endorsed). There is no guarantee that measures included in the TRM will be offered by all utilities.

When a submittal receives a "YES" or "ABSTAIN" vote from all voting TRM MC member companies, then the change has officially been adopted by the TRM MC. Adopted additions or revisions will formally be documented in the quarterly Record of Revision filing and with effective dates in the detailed work plan. A TRM MC member company may choose to adopt a newly-approved measure or revision ahead of its effective date to expedite accurate program savings calculations and/or methodologies.

D. Codes and Standards Review and Adoption Process

The TRM MC must ensure that the TRM complies with all applicable federal, state, and local codes and standards. NYSERDA will serve as a resource to the TRM MC on how codes and standards development have and will affect EE/BE portfolios. NYSERDA shall present regular updates to the TRM MC and DPS Staff regarding codes and standards that impact the TRM. NYSERDA shall ensure that all measures in the TRM accurately reflect effective codes and standards and work with the TRM MC to integrate compliance efficiency levels into the TRM.[26]

The review will investigate applicable federal state, and local codes and standards related to equipment minimum efficiency and rating/testing standards (e.g., DOE Rulemaking procedures), future adoption of new or revised codes and standards (e.g., adoption of new state energy conservation code), and energy efficiency standards or guidelines that may be used to inform compliance efficiency requirements for energy efficiency measures (e.g., ENERGY STAR® Program Requirements).

This process will be conducted as part of the consolidated filing process that coincides with the second quarter ROR review cycle each year. At the conclusion of this annual review, the TRM MC will produce a report of its findings pertaining to current and future applicable codes and standards, details of anticipated measure revisions, and an implementation schedule for future TRM edits to ensure codes and standards and regulatory alignment. See the C&S Review Report section below for details of the contents of this report. This report will be published to the NYS TRM website[27] prior to circulation of consolidated annual filing redlines and updated on an as needed basis (at minimum, refreshed once annually). All measures affected by updated codes will be listed in the summary of changes in the TRM consolidated filing.

The first stage of this process, performed by the TRM Technical Editor, will entail review of all measure methods prescribed in the current effective version of the NYS TRM and documentation of all codes and standards references dictating baseline and compliance requirements. Once compiled, the TRM Technical Editor will proceed with investigation into regulatory proceedings, planned adoption of new or revised codes and standards, and potential sources to inform measure compliance efficiency requirements. These findings will be documented alongside the details of current references to demonstrate anticipated changes and corresponding revision and effectuation

[26] Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative ("EE/BE Proceeding"), Order Authorizing Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030 ("2025 Non-LMI EE/BE Order") (issued May 15, 2025) pp. 62.

[27] https://dps.ny.gov/technical-resource-manual-trm

schedules.

Although this effort will be led by the TRM Technical Editor, the TRM MC and various stakeholder groups are considered critical contributors and will be consulted for insight into current and future codes and standards developments for the duration of the process to ensure comprehensiveness of review.

Once details of current and future codes and standards have been documented, the TRM Technical Editor will draft anticipated impacts of NYS TRM adoption of future provisions, details of requisite revisions to each NYS TRM measure methodology, and a suggested implementation schedule to uphold NYS TRM compliance with codes and standards effectuation dates.

The compiled report will then be distributed to the TRM MC and DPS Staff for review in anticipation of a discussion to refine and finalize the report. This review period and subsequent discussion will afford the TRM MC and DPS Staff an opportunity to provide feedback on details of reviewed codes and standards, inform the TRM Technical Editor of additional references to be included that were not identified in the initial review, and verify the proposed schedule and details of changes. Following TRM MC/DPS Staff review and discussion, the TRM Technical Editor will incorporate proposed changes and finalize the report for publication. The final report will be filed to DMM by the TRM MC Secretary and published on the NYS TRM website by the DPS Staff.

While the annual process is anticipated to span mid-March through mid-May (see Appendix A, C&S Review Schedule), the report will be refreshed as needed to reflect critical updates identified throughout the year. These updates may include augmentation of existing report content based on newly published reference material, identified codes and standards changes with effectuation dates preceding the next review cycle, and modifications to implementation schedules based on reprioritization of measure revisions, among others. Appendix B provides the layout and example of content for the C&S report.

To improve TRM user experience, increase transparency, and safeguard against misalignment with codes and standards, as available, the expiration date of the current applicable standard, and the version number, effectuation date, expiration date, and URL to available reference material pertaining to any future codes and standards will be included in Baseline and Compliance Efficiency sections within each measure section of the NYS TRM. This will reinforce the findings of C&S review and anticipated changes to TRM methods and provide additional visibility to future codes and standards impacts. This enhancement will be implemented as a global revision during each annual consolidated filing and measures in quarterly review batches will be updated as necessary to reflect mid-year changes to the C&S Review Report. Any and all TRM content pertaining to codes and standards (e.g., references, links, excerpts, appendices, etc.) will be reviewed and maintained as part of this process.

Coincident with the adoption of the formal codes and standards review process, substantive changes to measures applied as part of annual filings (including updates to baseline and compliance specifications related to codes and standards changes) will be identified with a unique revision number. This change will improve revision tracking, measure version control, and transparency to applied changes.

E. TRM MC Activities

The following work activities are conducted by the TRM MC to support its on-going, primary purpose of maintaining and updating the TRM:

1. Meetings

The TRM MC will schedule weekly meetings which will be communicated to all TRM MC participants. The purpose of these meetings is to discuss progress on current work, planning for future work, and to discuss any outstanding items. Additional meetings may be scheduled on an ad-hoc basis as determined by the TRM MC.

2. Detailed Workplan

The TRM MC will follow and manage a detailed workplan which will include a recap of work completed, and an on-going workload prioritization list. A representative example of a current, detailed workplan is included as Appendix A to this filing. The TRM MC will include the most up-to-date version of the detailed workplan within quarterly record of revision filings to ensure transparency.

Each quarter, the detailed workplan will encompass a list of approved measures by priority, along with a brief explanation for any measures that were not approved. The workplan will specify the EUL of each measure, Strategic Framework designation, and the reason for strategic classification. The detailed workplan will focus on codes, standards, demand savings updates, new measures, emerging technologies, as well as results from on-going EM&V studies. While all input from the

TRM MC, and stakeholders, will be considered, DPS Staff will ultimately determine the final detailed workplan.

a) Codes, Standards, and Demand Savings

The TRM MC continuously evaluates best practices and methodologies for determining energy savings. This includes establishing appropriate baselines, input variables, and considers relevant energy codes, industry standards, and assumptions related to demand savings. The TRM MC works with the Technical Editor to update these items prospectively, where applicable, in order to maintain an accurate and reliable TRM. The approach and plan for updating codes, standards and demand savings assumptions is documented in Section D above.

b) New Measures

The TRM MC will incorporate new measures into the TRM once the submissions are reviewed and receive approved votes from the TRM MC. The TRM MC requires that submittals adhere to the Addition/Change process described above, and that each submission follows the standardized format. A standardized format template for new measure submittals is located on the NYS TRM website[28] as well as included in Appendix C. For a detailed overview of the measure review process, refer to the workflow provided in Appendix D.

The TRM MC's method for receiving new measures and existing measure modifications can originate from the following channels:

(1) Member contributions

The MC Members play a critical role in shaping the TRM by submitting proposed measure changes based on their expertise in implementing EE/BE portfolios and related initiatives. Leveraging their direct experience and insights gained through interactions with customers, vendors, contractors, technology innovators, and other market stakeholders, members are well-positioned to identify emerging needs and opportunities. This market-informed perspective enables the MC to introduce new measures that reflect current trends and support broader market adoption of innovative technologies.

All member submissions must follow the standardized process and timeline outlined in Appendix D of the TRM Management Plan for consideration and potential inclusion in the TRM.

[28] http://www3.dps.ny.gov/W/PSCWeb.nsf/All/72C23DECFF52920A85257F1100671BDD?OpenDocument

(2) Third party contributions

Market actors, such as vendors and manufacturers, are encouraged to submit new measures, revisions, and corrections to the TRM MC. To encourage continuous market development, TRM MC works with these stakeholders to advise the following: (1) how to prepare submittals for the TRM MC's consideration, and (2) supporting documentation that should be provided.

Measure submittals to the TRM MC must follow a specific form and format, which includes among other things: supporting references, resource documentation, calculation, and input assumptions. A standardized template for the specific form and format is available on the NYS TRM website[29] and is included in Appendix C to this filing.

All proposals and related questions should be submitted via email to the TRM MC Co-Chairs and the MC Secretary, with other MC Member Organizations copied as appropriate. The TRM MC is available to address any questions during the preparation phase to help ensure submissions meet the required standards.

The TRM MC will determine when a submittal is ultimately deemed complete and is ready for TRM MC membership voting. Submittals to change existing content within the TRM must be accomplished by redlining the existing page or pages in the currently effective TRM. Supporting information for the redlined changes being made must accompany the redlined document. Once the redlined document is prepared it must be submitted via email to the TRM MC Co-Chairs and the MC Secretary, with other MC Member Organizations copied as appropriate. During TRM MC meetings, any input (either verbal during meetings or written between meetings) received from TRM MC member companies, Staff or other external stakeholders is welcomed and will be recorded by the MC Secretary and considered by the TRM MC.

[29] *See* http://www3.dps.ny.gov/W/PSCWeb.nsf/All/72C23DECFF52920A85257F1100671BDD?OpenDocument

(3) EM&V and market potential studies

MC Member Organizations regularly conduct market potential, baseline, and impact evaluation studies which help to inform TRM planning and development. These studies help identify areas of the marketplace where there may be opportunities for increased measure uptake and assess the performance of existing measure offerings. Upon completion of any such study, the results are analyzed in accordance with the protocol outlined below.

The TRM MC will review the results of these analyses and, depending on the results, determine whether updates to the TRM are warranted. Results from filed EM&V studies should be presented to the TRM MC by entity that managed the study, following the Addition/Revision process defined in this plan. This may be in the form of a redline submittal or the identification of items to be added to the detailed workplan (when items are identified requiring further research, analysis or investigation).

To support coordination and transparency, MC Member Organizations plan to communicate and collaborate on ongoing evaluations. This may include tracking active and planned studies to prioritize efforts and ensure timely consideration of findings for TRM updates.

Submittals resulting from completed evaluation studies may be presented at any time during the calendar year. EM&V revisions will be included in the detailed workplan with the corresponding effective dates. To the extent that the TRM MC is facing a significant workload with respect to pending submittals under review, MC Member Organizations will prioritize submittals through discussion and consensus during TRM MC meetings.

c) Stakeholder Forums

In consultation with Staff and other stakeholders, the TRM MC will host a minimum of one stakeholder forum each year. The forum(s) will provide a general overview of the TRM, an update of recent TRM activity, and emerging technology trends. Since stakeholder forums need to be coordinated with Staff, the TRM MC recognizes that the schedule of forums will need to be determined, and information regarding the logistics of the forums will need to be prepared and disseminated. Notification of stakeholder forums will be formally filed under matter number 15-01319.

3. Outstanding Revisions

Outstanding revisions to the TRM will continue to be identified, discussed, and prioritized during

TRM MC meetings. Other potential items (i.e., form and format, consistency of reference citations, and the relevancy of appendices) will also be prioritized during TRM MC meetings.

F. Transparency

One of the primary goals of the TRM MC is to ensure transparency with respect to past and current versions of the TRM, and the functional processes employed by the TRM MC. To that end, stakeholders are encouraged to contact the TRM MC directly, to the extent they have questions or wish to prepare a submittal for the TRM MC's consideration. The contact information for the current TRM MC Co-Chairs and secretary are located on the NYS TRM website.[30]

If a TRM stakeholder wishes to prepare a submittal for the TRM MC's consideration, the process to do so as well as the timing of the process is described above in the "Addition/Revision Process" section of the TRM Management Plan. The TRM MC will include stakeholders in TRM MC meetings, as needed, to: (1) review or move forward a submittal, or (2) identify if outside technical expertise is necessary.[31] The TRM MC Co-Chairs, or a designee named by the Co-Chairs, will be in contact with stakeholders to discuss the status of their submittal(s), as well as "next steps" in the functional workflow.

Each filing cycle, a TRM MC member will file a cover letter, records of revision, and all relevant documents on behalf of the entire TRM MC. The filing party is indicated in the Detailed Workplan. TRM filings will be made through the DMM in matter number 15-01319.[32] When quarterly record of revisions, or annual TRM filings are completed, the information filed becomes a public document, thus ensuring stakeholder transparency.

The TRM MC will continue to work with DPS Staff to coordinate NYS TRM website updates and to post relevant information that pertains to the TRM or the TRM MC. The opportunity to collaborate and coordinate with DPS Staff in this regard is greatly appreciated by the TRM MC and will help expand the reach of TRM information to stakeholders and members of the general public.

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[30] *See http://www3.dps.ny.gov/W/PSCWeb.nsf/All/72C23DECFF52920A85257F1100671BDD?Open Document*

[31] The TRM Administrators reserve the right to caucus, when necessary, and will provide follow up from those discussions (e.g., this may be necessary for the TRM Administrators to make a group decision, about the need for and cost of outside technical expertise).

[32] Matter 15-01319 – *In the Matter of the New York State Technical Resource Manual*.

VI. GLOSSARY

Abbreviations, Acronyms, and Equation Variables	
Central Hudson	Central Hudson Gas and Electric Corporation
Con Edison	Consolidated Edison Company of New York, Inc.
Commission	New York State Public Service Commission
DMM	Document and Matter Management
DOE	The Department of Energy
DPS	Department of Public Service
EM&V	Evaluation, Measurement, and Verification
EUL	Effective Useful Lifetimes
LIPA	Long Island Electric Utility Servco LLC as agent of and acting on behalf of Long Island Lighting Company d/b/a LIPA
LMI	Low- to Moderate-Income
M&V	Measurement and Verification
MC Members	Representatives Who Sit on the Management Committee
MC Member Organizations	The Individual Organizations That Make Up The TRM MC.
National Fuel	National Fuel Gas Distribution Corporation
National Grid	Niagara Mohawk Power Corporation d/b/a National Grid, The Brooklyn Union Gas Company d/b/a National Grid NY and KeySpan Gas East Corporation d/b/a National Grid
NYSEG	New York State Electric & Gas Corporation
NYSERDA	New York State Energy Research and Development Authority
O&R	Orange and Rockland Utilities, Inc.
REV Proceeding or REV	Reforming the Energy Vision

RG&E	Rochester Gas and Electric Corporation
TRM	Technical Resource Manual
TRM MC	TRM Management Committee

VII. Appendix A. TRM MC Schedules and Workplan

Cyclical Filing Schedule

Below is a representative sample of the cyclical filing schedule that shows all filings that will occur throughout the year. The schedule below, updated as of the date of this filing, shows all filings anticipated through the end of calendar 2026.

Item No.	Filing	Due Date
1	2024 Q4 Record of Revision	2/7/2025
2	2025 Q1 Record of Revision	3/31/2025
3	2025 TRM Management Plan Update	8/13/2025
4	**TRM Version 13 Filing (for 2026)**	**11/21/2025**
6	2025 Q4 Record of Revision	12/31/2025
7	2026 Q1 Record of Revision	3/31/2026
8	2026 Q2 Record of Revision	6/30/2026
9	**TRM Version 14 Filing (for 2027)**	**7/31/2026**
10	2026 Q3 Record of Revision	9/30/2026
11	2026 Q4 Record of Revision	12/31/2026

Detailed Workplan

The most recent version of the Detailed Workplan can be found on the DMM under matter number 15-01319. Since this document will be continuously refined, any updates to the detailed workplan will be filed simultaneously with the quarterly record of revision and will be located on the NYS TRM website.[1]

VIII. Appendix B. Codes and Standards Review Report Template

At the conclusion of each codes and standards review cycle, an Excel-based report presenting the results of the review and details, impacts, and schedule of planned TRM revisions will be published to DMM and the NYS TRM website. This report will be used by the MC and TRM Technical Editor to inform future NYS TRM quarterly and annual workplans and as a primary reference for application of measure revisions.

Each record in the published report will represent a single code/standard provision (e.g., federal standard establishing baseline CADR/W efficiency rating for Residential Air Purifiers). The report will consist of the following fields, organized into four (4) sections as outlined below:

1. General Information
    a. TRM Version Number
        i. The version number of the NYS TRM that is the subject of the C&S Review Report
    b. Measure Section (RES/C&I)
        i. The section of the reviewed NYS TRM (Residential vs. Commercial & Industrial) in which the measure appears
    c. Measure Category
        i. The category in the reviewed NYS TRM under which the measure appears
    d. Measure Name
        i. The name of the measure as specified in the reviewed NYS TRM
    e. Last Revision (ROR Filing)
        i. The most recent quarterly or annual filing in which the measure was revised
    f. Last Measure Review / Revision Date
        i. The issue date of the last applied revision to the measure
    g. Last C&S Review / Revision Date
        i. The date of the last review of or revision to the specified baseline or compliance code provision in the C&S Review Report (primarily used to track mid-year changes)
2. Applicable Codes & Standards (Current)
    a. Baseline / Compliance
        i. Indication of whether the specified code or standard dictates baseline or compliance specifications for the measure
    b. Current Code / Standard
        i. Name and version number of the current applicable code or standard
    c. Current Code / Standard URL

        i. Link to the current applicable code or standard
    d. Current Code / Standard Effective Date
        i. Date on which the current applicable code or standard went into effect
    e. Current Code / Standard Expiration Date
        i. Date on which the current applicable code or standard is set to expire, if specified
3. Applicable Codes & Standards (Future)
    a. Future Code / Standard
        i. Name and version number of the future code or standard that will supersede the current requirement
    b. Future Code / Standard URL
        i. Link to the future code or standard
    c. Future Code / Standard Effective Date
        i. Date on which the future code or standard will take effect, if specified
    d. Future Code / Standard Expiration Date
        i. Date on which the future code or standard will expire, if specified
4. Revision Detail, Schedule, Notes
    a. Impact of Change
        i. Description of the effects of adoption of the new code or standard on measure baseline or compliance specifications
    b. TRM Revision Detail
        i. Description of anticipated revisions to measure content to reflect adoption of the new code or standard (synonymous with Description of Change column in ROR Table of Revisions/Changes)
    c. Revision Schedule (ROR)
        i. Quarterly or annual filing in which anticipated changes are to be applied
    d. Notes
        i. Additional detail pertaining to development of codes and standards related to measure baseline and compliance specifications (e.g., used to highlight potential conflicts associated with adoption of new baseline or compliance requirements)

Examples of the contents of the report, separated by each of the four (4) sections identified above for readability, are presented below:

General Information

REF ID	General Information						
	TRM Version Number	**Measure Section (RES/C&I)**	**Measure Category**	**Measure Name**	**Last Revision (ROR Filing)**	**Last Measure Review / Revision Date**	**Last C&S Review / Revision Date**
V11_R001_B01	V11	RES	Appliance	Air Purifier	V11 - 2023 Annual Filing	10/10/2023	10/10/2023
V11_R001_C01	V11	RES	Appliance	Air Purifier	V11 - 2023 Annual Filing	10/10/2023	10/10/2023

Applicable Codes & Standards (Current)

Applicable Codes & Standards (Current)				
Baseline / Compliance	**Current Code / Standard**	**Current Code / Standard URL**	**Current Code / Standard Effective Date**	**Current Code / Standard Expiration Date**
Baseline	NYSERDA NY State Appliance and Equipment Standards via 2021 ASAP Model Bill	https://www.nyserda.ny.gov/All-Programs/New-York-State-Appliance-and-Equipment-Efficiency-Standards/Current-Standards	6/26/2023	12/31/2025
Compliance	ENERGY STAR® Product Specification for Room Air Cleaners, Eligibility Criteria, V2.0, Rev. May 2022.	https://www.energystar.gov/sites/default/files/asset/document/ENERGY%20STAR%20 Version%202.0%20Room%20 Air%20Cleaners%20Specificat ion%20%28Rev.%20May%202 022%29.pdf	5/12/2022	N/A

Applicable Codes & Standards (Future)

Applicable Codes & Standards (Future)			
Future Code / Standard	**Future Code / Standard URL**	**Future Code / Standard Effective Date**	**Future Code / Standard Expiration Date**
10 CFR 430.32(ee)(2)	https://www.ecfr.gov/current/title-10/part-430#p-430.32(ee)(2)	12/31/2025	N/A
N/A	N/A	N/A	N/A

Revision Detail, Schedule, Notes

Revision Detail, Schedule, Notes			
Impact of Change	**TRM Revision Detail**	**Revision Schedule (ROR)**	**Notes**
Increase in applicable CADR/W baselines	Update Baseline Efficiency section narrative to indicate new standard; update baseline CADR/W table to reflect new standard; update footnotes and references to reflect new standard	Q2 2025	New standard takes effect on final day of 2025 - request 1-day leniency to align with effectuation of 2026 consolidated TRM
N/A - No future compliance standard identified	N/A - No future compliance standard identified	Q2 2025	While no future compliance standard has been identified, future baseline efficiency standard (*REF ID: V11R001B*) is equal to current compliance standard. Will need to establish alternative compliance requirement and implement concurrent with baseline standard change.

Codes and Standards Review Schedule

Review Process Schedule - Annual Cycle			
Start Date	**Business Days**	**Task**	**Responsible Party**
March 15th	20	Review and document codes and standards references cited in all Residential and Commercial & Industrial Measures in the current effective version of the NYS TRM	TRM Technical Editor
		Investigate and document regulatory proceedings, planned adoption of new or revised codes and standards, and potential sources to inform measure compliance efficiency requirements	TRM Technical Editor
		Develop impact, detail, and schedule of requisite TRM revisions	TRM Technical Editor
April 15th	N/A	Distribute codes and standards review report to MC/DPS for review (see C&S Review Report section for details)	TRM Technical Editor
April 15th	10	Review codes and standards report, provide feedback, and prepare for discussion of detailed action items and implementation schedule	MC
May 1st	N/A	Discuss codes and standards report findings and feedback, action items, and implementation schedule	TRM Technical Editor & MC
May 1st	10	Incorporate consensus edits to codes and standards report, finalize action items and implementation schedule	TRM Technical Editor
May 15th	N/A	Circulate final report, including action items and implementation schedule to MC/DPS	TRM Technical Editor
May 15th	N/A	File final report on DMM and publish to NYS TRM website	MC

IX. Appendix C. Measure Template

Define Sector

Name of Measure

Strategic Classification

<< STAFF DETERMINED BY THE REVIEW PROCESS>>

Measure Description

<<A BRIEF SUMMARY OF THE MEASURE (See current descriptions in the TRM as examples)>>

Method for Calculating Annual Energy and Peak Coincident Demand Savings

<<SHOW THE CALCULATION(S) IN DETAIL>>

where:

<<INCLUDE DEFINITION OF VARIABLES IN RELATION TO THE INFORMATION REQUIRED IN THE CALCULATION(S)>>

Summary of Variables and Data Sources

<<DETAIL APPROPRIATE INFORMATION HERE>>

Coincidence Factor (CF)

<<DETAIL APPROPRIATE INFORMATION HERE>>

Baseline Efficiencies from which Savings are Calculated

<<DETAIL APPROPRIATE INFORMATION HERE – INCLUDE COMPLIANCE DATES FOR CODES & STANDARDS>>

Compliance Efficiency from which Incentives are Calculated

<<DETAIL APPROPRIATE INFORMATION HERE>>

Operating Hours

<<DETAIL APPROPRIATE INFORMATION HERE>>

Example Calculation

<<DETAIL APPROPRIATE INFORMATION HERE>>

Ancillary Fossil Fuel Savings Impacts

<<IF REQUIRED>>

Ancillary Electric Savings Impacts

<<IF REQUIRED>>

References

<<LIST ALL REFERENCES HERE (INCLUDING SUPPORTING STUDIES)>>

Record of Revision

Record of Revision Number	Issue Date	Effective Date	Revision Summary

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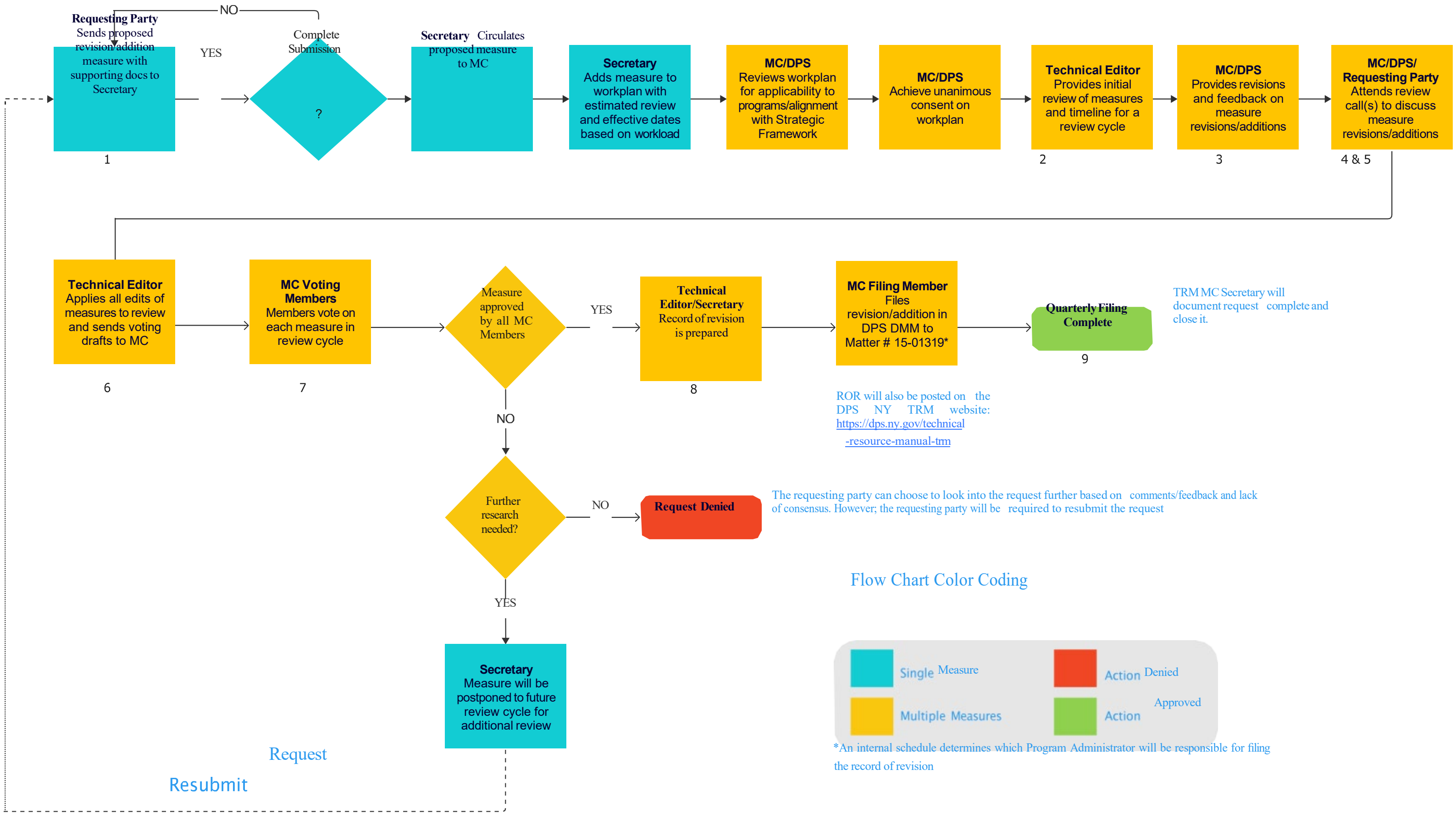
X. Appendix D. TRM MC Workflow Process

TRM MC Revisions/Additions Process

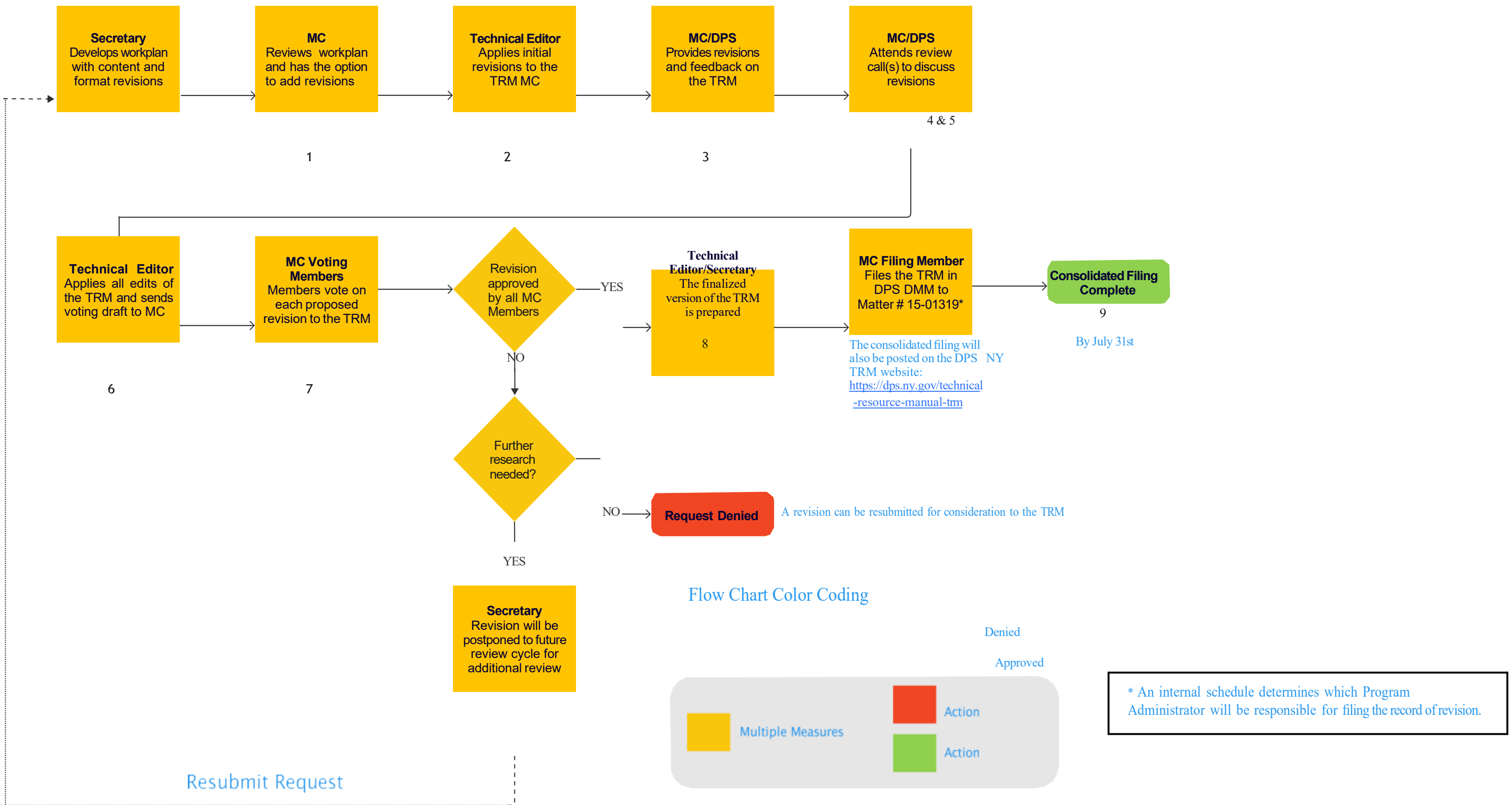
Third party/external entities can submit their requests to the committee following the same steps. The revisions and additions process starts with the beginning of every quarter.



Flowchart Representation	Milestone	Est. Time Frame
1	Deadline for measure submitting measures to be included in revision cycle	Up to 10 business days prior to initial revisions
2	Workplan review and vote for approval	~1 week
3	Initial Revisions to MC/DPS	~1 Month
4	MC/DPS Review Comments Due	~1 Month
5	MC/DPS Review Call	The following Tuesday
6	Optional Follow-up Call	The following Tuesday
7	Final Drafts to MC for Voting	~3 business days
8	MC Voting Due	4 business days or more
9	ROR Documents to filing MC member	~3 business days
10	ROR Filed by filing MC member	~3 business days

TRM MC Consolidated Filing

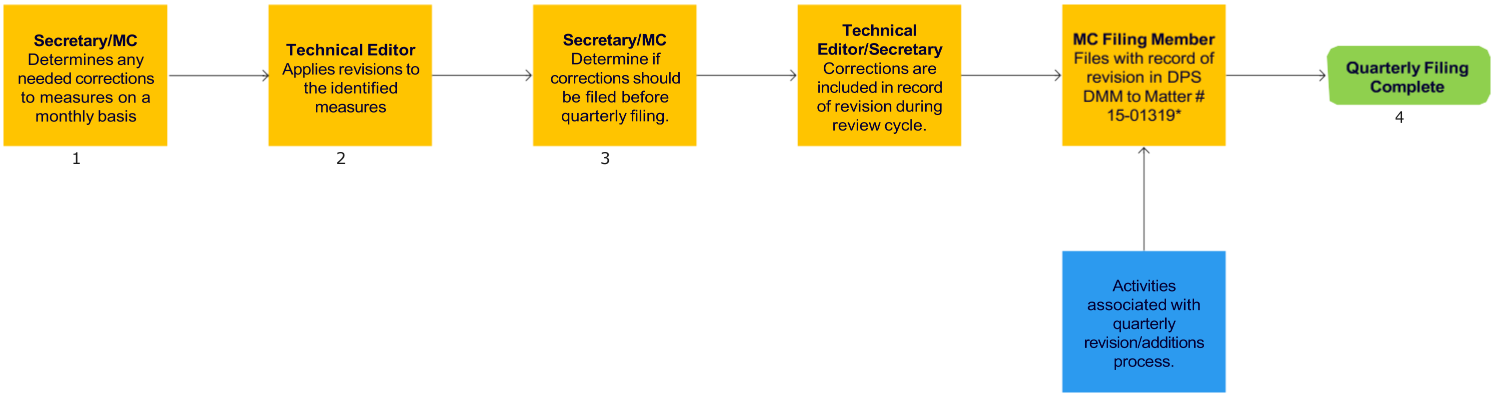
The consolidated filing inserts all records of revision from the year into the TRM. It also serves an opportunity to include other global updates, such as addressing type-os, broken links, addition of custom measures, and adoptions of standards.



Flowchart Representation	Milestone	Est. Time Frame
1	Deadline for measure revisions to be included in the consolidated filing	Up to 10 business days prior to initial revisions
2	Initial Revisions to MC/DPS	~1 Month
3	MC/DPS Review Comments Due	~2 Weeks
4	MC/DPS Review Call	The following Tuesday
5	Optional Follow-up Call	The following Tuesday
6	Final Draft to MC for Voting	~3 business days
7	MC Voting Due	4 business days or more
8	Consolidated Filing Documents to Filing Member	~3 business days
9	Documents Filed by Filing Member	~3 business days

TRM MC Corrections Process

A correction consists of small edits that fix type-os, erroneous information, outdated references, and broken links.



Flow Chart Color Coding

*An internal schedule determines which Program Administrator will be responsible for filing the record of revision

Flowchart Representation	Milestone	Est. Time Frame
1	Determines corrections in a month	Beginning of each month
2	Applies revisions to the identified measures	~1 week
3	Posts lists of corrections on website	~1 week
4	Correction included with record of revision filing	End of quarter