RESEARCH CALL TO ALL FEDERALLY FUNDED RESEARCH AND DEVELOPMENT CENTERS

U. S. Department of Energy

National Energy Technology Laboratory

COMMERCIAL BUILDINGS INTEGRATION NATIONAL ACCOUNTS PARTNERSHIPS

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Pre-Application Due Date:	**Not Applicable**
Application Due Date:	**07/15/2008 at 11:59:59 PM Eastern Time**

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SECTION I – GENERAL INFORMATION

A. RESEARCH CALL OBJECTIVES

The Department of Energy (DOE) National Energy Technology Laboratory (NETL), on behalf of the Office of Energy Efficiency and Renewable Energy's (EERE) Building Technologies Program (BTP), is seeking applications for establishment of a National Account (NA) Team(s) to accelerate market adoption of currently available energy saving technologies into standard design practice for commercial buildings. BTP seeks the technical resources necessary for cost-effective enhancement of new commercial building designs and retrofit of existing buildings to achieve at least 50% and 30% energy savings, respectively, above ASHRAE Standard 90.1-2004. This Research Call is focused on the Retailer, Commercial Real Estate, and Institutional (Energy Smart Hospitals subsector) target markets as defined later. The energy savings targets for the Energy Smart Hospitals subsector are 20% for retrofits and 30% for new buildings.

DOE estimates that approximately $15 million shall be available for up to 3 awards under this Research Call. Projects must be 20 percent cost shared by the NA Team and may be proposed with performance periods between 3 to 5 years. Awards shall include continuation decision points and may be partially funded in future fiscal years, dependent upon project success and availability of funds.

B. BACKGROUND INFORMATION

The Department's Strategic Plan identifies five strategic themes (one each for nuclear, energy, science, management, and environmental aspects of the mission) plus 16 strategic goals that tie to the strategic themes. The BTP supports the following goals:

- Strategic Goal 1.4, Energy Productivity: Cost-effectively improve the energy efficiency of the U.S. economy.

- Strategic Goal 3.3., Research Integration: Integrate basic and applied research to accelerate innovation and to create transformational solutions for U.S. energy needs.

The Program concurrently supports:

- Strategic Goal 1.2, Environmental Impacts of Energy: Improve the quality of the environment by reducing greenhouse gas emissions and environmental impacts to land, water, and air from energy production and use.

To support these goals, the BTP has developed one program goal: Develop cost-effective tools, techniques and integrated technologies, systems, and designs for buildings that generate and use energy so efficiently that buildings are capable of generating as much energy as they consume.

Program Strategic Goals

In support of the President's policies and initiatives, BTP has embraced the strategic goal of developing net-zero-energy buildings to reduce national energy demand. The Program has defined its strategic goal more specifically as:

To create technologies and design approaches that enable net-zero-energy buildings at low incremental cost by 2025. A net-zero-energy building is a residential or commercial building with greatly reduced needs for energy through efficiency gains (60 to 70 percent less than conventional practice), with the balance of energy needs supplied by renewable technologies. These efficiency gains will have application to buildings constructed before 2025, resulting in a substantial reduction in energy use throughout the sector.

A key strategy for the DOE's Commercial Buildings Integration (CBI) project is to work with commercial building owners and property portfolio managers to meet the net-zero-energy commercial building goal by 2025. For the CBI subprogram, the strategy will, in part, be addressed through the formation of strategic National Energy Alliances (NEAs) for four specific target markets (i.e., Retailer, Commercial Real Estate, Institutional, and Building Industry). The NEAs will be informal associations that combine business and organizations with similar building types (e.g., "big-box" one-story, high ceiling) and business sectors with agreements to share non-proprietary, building energy efficiency information and work together to achieve cost reductions in high efficiency building equipment through combined purchases. A primary goal of establishing NEAs is to gain corporate commitment with DOE to promote increased energy efficiency in U.S. commercial buildings. The members will share a common goal in reducing energy consumption by significant levels in new and existing commercial buildings.

In addition, the CBI subprogram has adopted a strategy to develop National Accounts (NAs) for the same target markets. Each NA Team shall consist of a Commercial Building Design Team (CBDT), comprised of a national lab as the CBDT Lead investigator and expert design consultants (e.g., A/E firms, HVAC consultants), and National Account Companies (NACs) to create opportunities for significant energy efficiency increases in the nation's building stock. Figure 1 provides an example of various organizations making up an NA Team. The NACs are defined as a company or organization that designs, builds, owns, and/or operates its own stock of buildings and has a company commitment to significantly improve the energy efficiency of its buildings. Although the NA strategy is complementary to the NEAs, it is independent of the NEAs while still having common goals and target markets. The NACs do not need to be selected from the respective NEA membership, however, the NACs are urged to join the respective NEA after award to the NA Team under this Research Call.

From DOE's perspective, the ultimate goal is to raise the energy efficiency levels of a significant portion of building stock to 50% or greater energy savings as compared to ASHRAE Standard 90.1-2004. It is recognized, however, that the individual NACs will select a design and associated efficiency level that meet its cost constraints and operating needs. This challenge puts additional emphasis on the establishment of the NA Team participants with the need of assuring corporate commitment to the NA goals and objectives.

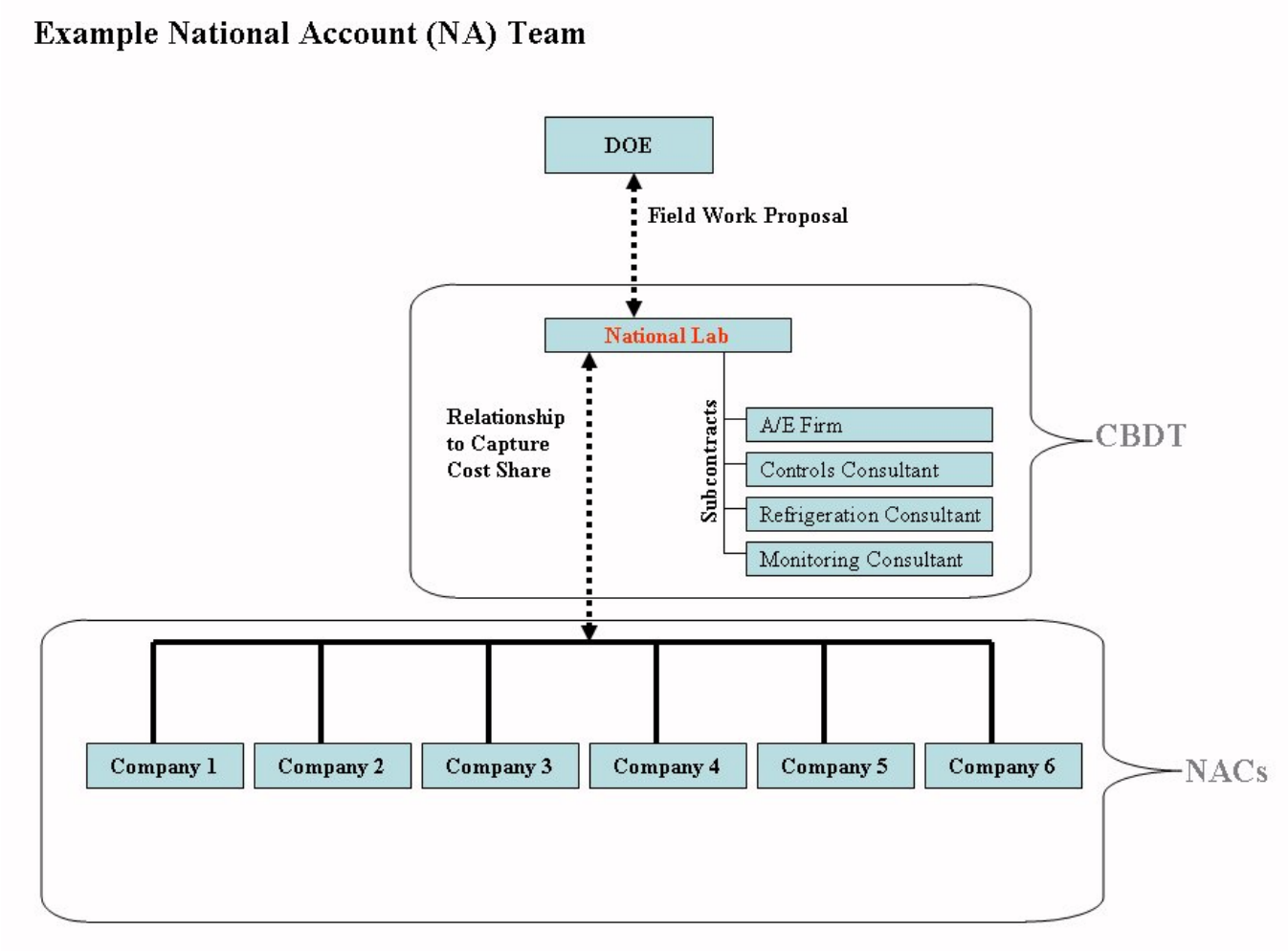

Figure 1. Example National Account Team.

Other Information

Briefly, the primary roles of the main NA participants are as follows. The BTP (DOE-Headquarters) is responsible for all aspects of the NA Team, including leadership, planning, budgeting, execution, and evaluation of results. The NA Team shall comprise a CBDT and NACs. This Research Call is for the establishment of the entire NA Team for each of the three target markets, one each for the Retailer, Commercial Real Estate, and Institutional (Energy Smart hospitals subsector) target markets. The proposing National Laboratory CBDT Lead shall arrange all necessary CBDT member subcontracts and establish necessary business relationships with participating NACs. Clear evidence of NAC support and commitment to the project must be presented in the application. The CBDT Lead shall serve as the technical integration manager for all NA activities and shall direct efforts of other CBDT members (e.g., their subcontractors) in coordination with the NACs. Funding for the NA Team is provided from the BTP to NETL for obligation on awards resulting from this Research Call. NETL is responsible for management of the NA Team awards while the CBDT executes the bulk of all project activities. It is envisioned that each of the three NA Teams shall have at least 6 NACs participating to

ensure appropriate representation of the specific target market.

The following websites provide a listing of available resources addressing Commercial Buildings Integration and some of its supporting technical components.

- **U.S. Department of Energy**
  High Performance Buildings web site
  www.eere.energy.gov/buildings/highperformance

  High Performance Buildings database
  www.eere.energy.gov/buildings/database

  EnergyPlus building energy simulation software
  www.eere.energy.gov/buildings/energyplus

  Building Technologies Multiyear Plan
  www.eere.energy.gov/buildings/about/mypp.html

- **Commercial Buildings Analysis Reports**
  Who Plays and Who Decides: The Structure and Operation of the Commercial Building Market
  www.eere.energy.gov/buildings/highperformance/pdfs/who_plays_who_decides.pdf

  Commercial Building Metrics Definitions
  www.eere.energy.gov/buildings/highperformance/performance_metrics/metrics_definitions.html

  Commercial Building Research Reports
  www.eere.energy.gov/buildings/highperformance/research_reports.html

- **ASHRAE**
  Standard 90.1
  www.ashrae.org
  www.realread.com/prst/pageview/browse.cgi?book=1931862664

  ASHRAE/IESNA/USGBC/AIA/DOE Advanced Energy Design Guides
  - Small Office (published 2004)
  - Small Retail (published 2006)
  - K-12 Schools (published January 2008)
  - Warehouses (published spring 2008)

  www.ashrae.org/technology/page/938

- **IEA Buildings and Community Systems (IEA ECBCS Programme)**
  Annex 40 Commissioning of Building HVAC Systems for Improving Building Energy Performance
  www.ecbcs.org/annexes/annex40.htm

www.commissioning-hvac.org

Annex 47 Cost Effective Commissioning of Existing and Low Energy Buildings
www.ecbcs.org/annexes/annex47.htm,
ctec-varennes.rncan.gc.ca/en/b_b/bi_ib/annex47/index.html

- **National Renewable Energy Laboratory**
  Lessons Learned from Case Studies of Six High-Performance Buildings
  www.nrel.gov/docs/fy06osti/37542.pdf

  Assessment of the Technical Potential for Achieving Net-Zero-Energy Buildings in the Commercial Sector
  www.nrel.gov/docs/fy08osti/41957.pdf

  Methodology for Modeling Building Energy Performance Across the Commercial Sector
  http://www.nrel.gov/docs/fy08osti/41956.pdf

C. PROGRAM AREA OF INTEREST

This Research Call is focused on the establishment of the NA Teams for the Retailer, Commercial Real Estate, and Institutional (Energy Smart Hospitals subsector only) target markets. Applicants may propose for any one target market or a combination of multiple target markets, however, separate stand-alone applications should be submitted. The proposed NA Team shall identify participating technical resources defining the CBDT (i.e., national lab as lead and necessary subcontractors) as well as participating NACs. (*Specific qualification parameters of NACs as well as target market categorizations are provided later.*) The CBDT shall share findings and other non-proprietary information with the respective NEAs. Enhancement and optimization of new commercial building designs and retrofits of existing buildings of the NACs are to achieve 50% and 30% whole-building energy savings, respectively, above ASHRAE Standard 90.1-2004. The energy savings targets for the Energy Smart Hospitals subsector are 20% for retrofits and 30% for new buildings. These savings shall include areas of building energy use not regulated by Standard 90.1.

Applications should focus on design, construction, operation, and retrofit to achieve high performance commercial buildings. This may include developing or modifying specific NAC prototype designs of buildings by benchmarking existing buildings, evaluating and developing prototype designs/equipment specifications, and/or other current design standards or practices. Additionally, it could include developing construction quality assurance documentation, installation instructions, commissioning energy efficient equipment, and developing and commissioning the whole building energy management monitoring and controls systems. DOE's energy simulation programs (EnergyPlus) and other building design support tools shall be used to develop the most energy-efficient building that meets business needs and cost targets of individual NACs.

The NA Teams shall provide case studies on the results of design, construction, commissioning, and retrofit of the NAC buildings. The NA Team partners shall also develop a business case for energy efficient improvements to prototype buildings. Furthermore, the NA Teams shall report on lessons learned and provide information for development of case studies and best practice documents for information sharing with the respective NEAs. BTP also expects the NA Teams to share research results at professional and business conferences.

The Retailer NA Team shall focus on:

- Food Sales/General Merchandise
- Food Only
- General Merchandise
- Food Service
- Warehousing and Distribution (e.g., parcel shipment)

The Commercial Real Estate NA Team shall focus on:

- Office Buildings
- Shopping Malls
- Leased Space
- Developers

- Hospitality and Lodging

The Institutional NA Team shall focus on:

- Energy Smart Hospitals

Scope

Collectively, the NA Team shall explore design strategies and business needs that can reduce energy use and meet the targets established in this Research Call. The overarching goal of the NA strategy is for the NAC to construct at least one new building and retrofit at least one existing building according to the proposed redesign by 2013. The full spectrum of options, as embodied in the suite of available building design tools, shall be analyzed and documented so that all members of the respective NEA have information necessary to make alternative choices.

<u>The NA Team and DOE shall:</u>

1. Set energy performance and demand, environmental, and cost targets for each building redesign and retrofit project in advance.
2. Share the results of the redesign with the respective NEA and, as mutually agreed upon, more broadly.

To ensure appropriate representation of the target markets, at least 6 qualifying NACs should participate for each NA Team with clear evidence of support to be provided in the application.

<u>CBDT Responsibilities</u>

The CBDT Lead shall provide independent expertise to review design concepts, participate in design coordination meetings and reviews, review construction document submissions and equipment specifications, aid in contract modifications to further energy efficiencies, participate in commissioning activities, assist in design and debug of controls and operational sequences, and assist in developing the monitoring and energy management systems. The CBDT shall also prepare business cases and individual case studies following testing/monitoring of new and retrofit buildings to verify energy performance and demand, environmental, and cost targets. The detailed findings shall be documented in reports for distribution to the respective NEA. In collaboration with DOE and the partner NACs, the CBDT shall develop target energy performance and demand, environmental, and cost levels as well as identify other programmatic success criteria for retrofits and new buildings. The CBDT shall provide necessary information to DOE in support of the BTP's Stage Gate decision process.

The CBDT shall perform the following technical tasks:

1. Work with individual NACs to benchmark existing buildings, any prototype designs, or other current design standards or practices.
2. Analyze one or more current designs and an existing building to determine the current energy usage baseline.
3. Provide expertise and consulting services (through use of energy simulation and other building design support tools, such as EnergyPlus) to assist individual NACs in developing the most energy-efficient building that meets their business needs and cost targets.
4. Mentor the NACs on use of energy simulation and other building design support tools as necessary.

5. Assist the NACs in the construction and commissioning of advanced energy efficient technologies and controls as well as implementation of the building energy management system.
6. Monitor and verify energy performance and demand, environmental, and cost targets and provide a detailed report of findings to the NAC. (This analysis shall support the NAC in acquiring tax or carbon credits from the reduced energy usage.)
7. Help the NACs adopt, as feasible, these energy efficiency measures in existing buildings.
8. Document findings/results as a case study and distribute to the respective NEA. At a minimum, this shall include the building technologies chosen as well as the full spectrum of options analyzed and put forward for consideration (30-50% savings or more), and the energy, environmental, and cost savings levels (%) achieved. More detailed data on company rationale (e.g., payback considerations) and costs shall be shared only with full agreement of the individual NAC.
9. Prepare an annual research report on lessons learned, research needs, design practices, useful tools, construction and installation guidelines, commissioning, and controls experience aggregated across all participating NACs.
10. Using information from NACs, develop business cases for both energy efficient retrofit and new building designs.
11. Attend semi-annual meetings of the NEA (Retailer, Commercial Real Estate, or Institutional) at DOE and present the status of all projects and completed case studies and business cases. Attend quarterly NEA steering committee meetings.

NAC Responsibilities

Each NAC shall commit to and take a lead role in designing, constructing, analyzing, retrofitting, and replicating at least one or more energy efficient buildings as the business case warrants to meet the energy performance and demand, environmental, and cost targets established in this Research Call or mutually agreed upon with DOE after award. Each NAC shall provide a building design team familiar with the building requirements of that company. Experience in the design, construction, and renovation of buildings that significantly exceed the requirements of ASHRAE Standard 90.1-2004 is a plus, but not necessary.

The NAC shall monitor and verify energy performance and demand in the newly constructed prototype. As needed, the CBDT shall provide technical assistance to help design the monitoring system, analyze data, and compare energy savings with the simulated results for the "as built" design. This monitoring process is expected to continue for at least one year after occupancy.

Each NAC shall provide the following:

1. Share the current building design drawings and specifications with the CBDT for analysis. This information shall be treated as business-sensitive and proprietary.
2. Work iteratively with the CBDT to determine an acceptable set of design and operational changes to meet energy and cost savings goals. This may take more than one building to accomplish.
3. Construct at least one (1) new building according to the new design that meets the target energy savings levels. The DOE and CBDT shall be given access to the site for occasional walk-through surveys, inspections, and to lend assistance.
4. Contract for third party commissioning of the building to determine the "as built" specifications.

5. Allow for long-term (at least one year) monitoring of building operation and energy use. The NAC shall pay for and install an Energy Management System and allow interoperability and communication with sensors and systems that facilitate analysis by the CBDT.
6. Conduct an analysis and retrofit at least one (1) existing energy inefficient building.
7. Work with the CBDT to develop business cases for both new and retrofit buildings. As the business cases shall be shared with NEA participants, they must not contain any proprietary or business sensitive information.
8. Attend semi-annual meetings of the respective NEA (Retailer, Commercial Real Estate, or Institutional) at DOE and present information about new and retrofit buildings of interest to the NEA. Attend quarterly NEA steering committee meetings.

NAC Qualification Parameters
To ensure the projects focus on a significant segment of the national building stock, the NAC must qualify by meeting the minimum criteria below:

- Have a documented corporate commitment to energy efficiency,
- The portfolio of similar buildings must have an aggregated total area of at least 5,000,000 sq. ft., and
- Must not have current, pending, or recent past (i.e., within the last 12 months) involvement with the CBDT Lead in work similar to Tasks 3 and 4 below.

<u>Task Structure</u>
The format, key requirements, and task titles to be used in each specific NAC-focused design, construction, commissioning, and retrofit subproject follows. Applications should address each task. Each applicant must propose 3 to 5 Budget Periods (years) of activity, maintaining the same task structure in each period and detail expected progress towards all tasks. Applicants should provide detailed descriptions of the activities planned in the first Budget Period and more general descriptions of outyear activities.

Task 1) Project Management Plan – The Project Management Plan shall be revised immediately after award and upon completion of each stage of project progression.

Task 2) Benchmarking – The CBDT shall evaluate building types for each NAC and determine which buildings are to be further evaluated based upon potential cost-effective energy savings. Following this evaluation, the CBDT shall propose a group(s) of buildings that shall be the focus of the remainder of the project. The CBDT shall present findings of the analysis and provide other necessary information to the DOE in support of the BTP's Stage Gate decision process.

Go/recycle/no-go – DOE will determine whether or not to proceed. Should DOE determine that the proposed buildings do not fulfill programmatic expectations, another NAC shall be selected and Task 1 shall be repeated.

Task 3) Design/Redesign – The CBDT shall work with the NACs to design a new building or redesign an existing building and/or specify equipment upgrades to be further considered. Detailed energy and cost analyses shall be conducted in conjunction with this effort to ensure that proposed changes meet performance expectations and are within the NAC business targets.

The CBDT shall develop a report detailing the proposed design/redesign as well as any other necessary information to DOE in support of the BTP's Stage Gate decision process.

Go/recycle/no-go – DOE will determine whether or not to proceed. If the proposed design/redesign and/or energy analysis does not fulfill programmatic expectations, the CBDT shall work with that particular NAC to make necessary modifications to resolve the deficiency, focus efforts on another building while starting Task 3 again, or another NAC shall be selected and the process shall be started again at Task 2.

Task 4) Performance Verification – A DOE approved monitoring and performance verification plan must be developed by the CBDT prior to energy performance and demand determinations. Following retrofit or construction of a new building according to the Task 3 design/redesign, energy performance and demand, environmental, and cost targets shall be verified by the CBDT through monitoring, calculation, and/or modeling. The CBDT shall present findings of the analyses conducted as well as any other necessary information to DOE in support of the BTP's Stage Gate decision process.

Go/recycle/no-go – DOE will determine whether or not to proceed. If the performance does not meet programmatic expectations, the CBDT shall work with that particular NAC to make necessary modifications to resolve the deficiency and verify performance improvement, focus efforts on another building while starting Task 3 again, or another NAC shall be selected and the process shall be started again at Task 2.

Task 5) Case Study - The CBDT shall develop a case study final report documenting all findings to include energy savings, redesign costs, and payback period for each building constructed or retrofitted. This case study shall be distributed to DOE and respective NEA members. These must be laboratory technical quality, peer reviewed reports for public distribution.

Task 6) Research Report – The CBDT shall prepare an annual, summary research report for DOE internal use on lessons learned, design practices and useful tools, construction and installation guidelines, commissioning, and controls experience gained for all buildings constructed or retrofitted. The final research report shall provide a comprehensive summary of the entire project and must be prepared as a laboratory technical quality, peer reviewed report for public distribution.

Task 7) Business Case - Each NAC, working with the CBDT, shall prepare at least one business case for each new and retrofit building designed/redesigned in this project. As these business cases shall be shared with NEA participants, they must not contain any proprietary or business sensitive information.

SECTION II: REQUIREMENTS AND ELIGIBILITY

A. ELIGIBLE APPLICANTS

All Federally Funded Research and Development Centers (FFRDC) are encouraged to submit proposals in response to this Research Call. For-profit, non-profit, state and local governments, Indian Tribes, and institutions of higher education are not eligible for this Research Call. Teaming with other FFRDCs is acceptable if this teaming leads to a greater likelihood of achieving the goals of the CBI subprogram in a timely fashion. Industry and Universities may participate as subcontractors if they provide general services or near term (i.e., less than 2 years) research activities. Cost sharing of 20 percent of the total award value is required by each NA Team.

Costs incurred from non-Federal sources of funds for CBDT personnel, NAC personnel, consultant, and subcontractor labor as well as travel, multi-use testing/monitoring equipment, monitoring costs, and supplies in direct support of the project activities detailed in this Research Call are allowable towards fulfillment of the cost sharing requirement. Building materials, equipment, leasing, insurance, real property, and general construction costs are not allowable towards fulfillment of the cost sharing requirement.

To be eligible for participation as a NAC under this Research Call, the individual company must not have current, pending, or recent past (i.e., within the last 12 months) involvement with the proposing CBDT Lead in work similar to Tasks 3 and 4 and meet minimum qualification parameters specified in Section I.C.

B. TYPE OF AWARD INSTRUMENT

Any project awarded as a result of this Research Call shall be processed through the NETL Financial Management Office as a Field Work Proposal, an Interoffice Work Order, or any other allowable method deemed appropriate by the Government. This Research Call and any resulting awards shall be managed by the National Energy Technology Laboratory.

C. ESTIMATED FUNDING

Approximately $15 million is expected to be available for new awards under this Research Call, funded over multiple government fiscal years. Current fiscal year funding is expected to be approximately $3.5 million.

D. EXPECTED NUMBER OF AWARDS

DOE anticipates making up to 3 awards this fiscal year under this Research Call. However, the Government reserves the right to fund, in whole or in part, any, all, or none of the proposals submitted in response to this Research Call and shall award that number of instruments which serves the public purpose and is in the best interest of the Government. In addition, the Government reserves the right to make “conditional selections” in the event that future funding should become available.

E. PERIOD OF PERFORMANCE

DOE anticipates making awards that range from 3 to 5 years. Awards shall have project and budget periods that are specific to the project and funding.

SECTION III: SUBMISSION INSTRUCTIONS

A. SUBMISSION INSTRUCTIONS

Proposals shall be submitted electronically to the following email address **no later than July 15, 2008 at 11:59:59 PM Eastern Time**:

Parrish Galusky, Project Manager
US Department of Energy
National Energy Technology Laboratory
Parrish.Galusky@netl.doe.gov

The applicant is encouraged to request a return notification to verify receipt of proposal.

You may submit more than one application. A separate application must be submitted for each technical approach and/or teaming arrangement proposed. Applications focusing on Retailer, Commercial Real Estate, or Energy Smart Hospitals only or any combination of these target markets shall be considered. If submitting towards multiple target markets, the application should be prepared such that it can be evaluated (e.g., costs, teaming arrangements, detailed tasks) for specific individual target markets so partial awards may be made. To reduce the potential for confusion, it is, however, preferred that separate applications be submitted for individual target markets and teaming arrangements.

Submissions from the same applicant that appear nearly identical (e.g. different only to the extent of operational or experimental variations) shall be rejected, with one retained as representative of the group. The single application retained shall be evaluated.

B. LATE APPLICATIONS, AMENDMENTS, AND WITHDRAWALS OF PROPOSALS

A proposal or amendment of a proposal shall be considered timely if it is received on or before the closing date indicated above. Proposals or amendments of proposals may be withdrawn by written notice from an authorized representative to the above address via e-mail or in writing.

A second proposal or amendment may then be submitted. The second or subsequent proposal must be submitted before the closing date to be considered. In the event that two or more proposals are received for the same project with the same title, the proposal with the latest postmark shall be considered for review. Therefore, it is important that applicants not merely make page changes and re-submit portions of the proposal that are amended. A complete amended proposal must be sent.

Proposals or amendments received after the closing date shall not be considered.

SECTION IV: APPLICATION PREPARATION

A. PREPARATION

The entire proposal should not exceed thirty (30) pages (excluding Appendices), single spaced, 1" margins (top, bottom, left, right), and when printed shall fit on size 8 1/2" by 11" paper. The type must be legible and not smaller than 11 point. The Technical Content (see Section IV.B.4) should not exceed twenty (20) pages of the total page limit. Evaluators shall review only the number of pages specified. In order to produce a comprehensive application for this Research Call, the applicant should address, at a minimum, the areas listed in the Table of Contents below.

Section	**Page**
Field Work Proposal Cover Sheet	i
Public Abstract	ii
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List of Tables	iv
List of Figures	v
List of Acronyms	vi
Detailed Cost Analysis	vii
Technical Content	1-20
Technical Merit and Implementation	
Commercial Building Design Team (CBDT) Roles and Capabilities	
National Account Company (NAC) Participation	
Project Management, Including Risk Management	
Appendices	
Statement of Work (SOW)	A
Project Management Plan (PMP)	B
Commitment Letters	C
Senior/Key Personnel	D
Current, Pending, and Recent Past Support	E

B. APPLICATION CONTENT

1. FIELD WORK PROPOSAL COVER SHEET

The form must be completed and signed by an official who is authorized to act for the applicant and project team members (other FFRDCs) and who can commit the applicant to comply with the terms and conditions of award, if one is issued.

2. PUBLIC ABSTRACT

The public abstract must contain a summary of the proposed activity suitable for dissemination to the public. It should be a self-contained document that identifies the name of the applicant, the project director/principal investigator(s), the project title, the objectives of the project, a description of the project, including methods to be employed, the potential impact of the project (i.e., benefits, outcomes), the target market of focus, and major participants. This document must not include any proprietary or sensitive business information as the Department may make it available to the public. The project summary must not exceed 1 page.

3. DETAILED COST ANALYSIS

The applicant shall provide detailed cost information pertaining to their proposal. At a minimum, the cost analysis shall provide information regarding personnel costs, overheads, travel, equipment, and supplies. Include a supplemental schedule that identifies the labor hours, labor rates, and cost by labor classification for each budget year. Also indicate the basis of the labor classification, number of hours, and labor rates. A detailed breakdown of cost sharing must also be included in this analysis.

Costs for subcontractors must be provided in a separate cumulative budget for each subawardee expected to perform work costing more than $100,000 (as total of Federal and non-Federal share).

4. TECHNICAL CONTENT

This section must detail the project objectives and provide a clear description of the work to be done. To facilitate the review process and to ensure maximum consideration, the applicant should address each of the criteria below while providing all of the requested information. These elements are consistent with the technical evaluation criteria in Part V of this Research Call. Sufficient information should be provided to enable the reviewers to evaluate the application in accordance with these elements. The Technical Content should not exceed twenty (20) pages of the total page limit. **EVALUATORS WILL ONLY REVIEW THE NUMBER OF PAGES SPECIFIED IN THE PRECEDING SENTENCE.**

a. Project Narrative. Do not include any Internet addresses (URLs) that provide information necessary to evaluate the application as information contained in those sites will not be reviewed. See Part VI.B for instructions on how to mark proprietary application information.

The project narrative must include:

- Project Objectives: This section should provide a clear, concise statement of the specific objectives, goals, and expected results of the proposed project.

- Merit Review Criterion Discussion The section should be formatted to address each of the merit review criterion and sub-criterion listed in Part V.A. Provide sufficient information so that reviewers will be able to evaluate the application in accordance with these merit review criteria. DOE WILL EVALUATE AND CONSIDER ONLY THOSE APPLICATIONS THAT ADDRESS SEPARATELY EACH OF THE MERIT REVIEW CRITERION AND SUB-CRITERION.

- Relevance and Outcomes/Impacts: This section should explain the relevance of the effort to the objectives in the program announcement and the expected outcomes and/or impacts.

- Roles Of Participants: For multi-organizational or multi-investigator projects, describe the roles and the work to be performed by each participant/investigator, business agreements between the applicant and participants, and how the various efforts will be integrated and managed.

- Facilities And Other Resources: Identify the facilities (e.g., office, laboratory, computer, etc.) to be used at each performance site listed and, if appropriate, indicate their capacities, pertinent capabilities, relative proximity, and extent of availability to the project. Describe only those resources that are directly applicable to the proposed work. Provide any information describing the other resources available to the project such as machine and electronics shops.

- Equipment: List important items of equipment already available for this project and, if appropriate, note the location and pertinent capabilities of each. If proposing to acquire equipment, describe comparable equipment, if any, already at your organization and explain why it cannot be used. This is equipment for the CBDT to execute activities of this Research Call and should not be confused with building systems equipment, such as HVACs, that are owned by the NAC.

- Bibliography And References, If Applicable: Provide a bibliography for any references cited in the Project Narrative section. This section must include only bibliographic citations.

- Project Performance Site: Indicate the primary site where the work will be performed. If a portion of the work will be performed at any other sites, identify those sites, also.

5. APPENDICES.

a. Statement Of Work (SOW): The Department of Energy's, National Energy Technology Laboratory uses a specific format for SOWs in awards. In announcements such as this one, where the Government does not provide an SOW, the Applicant is to provide one, which the DOE will then use to generate the SOW to be included in the award.

The project narrative must contain a single, detailed SOW that addresses how the project objectives will be met. The SOW must contain a clear, concise description of all activities to be completed during project performance and follow the structure discussed below. The SOW may be released to the public by DOE in whole or in part at any time. It is therefore required that it shall not contain proprietary or confidential business information.

The Statement of Work is generally less than 10 pages in total and is excluded from the 20-page limit of the Project Narrative. Applicants shall prepare the Statement of Work in the following format:

TITLE OF WORK TO BE PERFORMED

(Insert the title of work to be performed. Be concise and descriptive while avoiding non-descriptive terms such as 'novel' or 'innovative.')

A. OBJECTIVES

Include one paragraph on the overall objective(s) of the work. Additionally, each stage of the proposed project should have major milestones delineated. Tasks 1 and 2, Task 3, Task 4, and Tasks 5 through 7 shall each be considered as separate stages.

B. SCOPE OF WORK

This section should not exceed one-half page and should summarize the effort and approach to achieve the objective(s) of the work for each stage.

C. TASKS TO BE PERFORMED

Write tasks concisely and include DOE decision points in a logical sequence. Any specific issues/requirements for individual NACs should be provided as subtasks to the generalized discussion under each task. For example, if Company 1 has committed to construct 5 new buildings according to the Task 3 design, this should be detailed as Subtask 3.1. This section is to provide a brief summary of the planned approach to this project. Specific tasks, subtasks, and stages should follow the format below. An outline of the Project Management Plan (referenced in Task 1.0 below and required as part of the application) is provided later in this Part.

STAGE I

Task 1) Project Management Plan

(Description includes work elements required to revise and maintain the Project Management Plan and to manage and report on activities in accordance with the plan)

Task 2) Benchmarking – (The CBDT must provide input to DOE for the BTP Stage Gate decision process in order to proceed.)

Go/recycle/no-go –

STAGE II

Task 3) Design/Redesign – (The CBDT must provide input to DOE for the BTP Stage Gate decision process in order to proceed.)

Go/recycle/no-go –
STAGE III
Task 4) Performance Verification – (The CBDT must provide input to DOE for the BTP Stage Gate decision process in order to proceed.)

Go/recycle/no-go –

STAGE IV
Task 5) Case Study –
Task 6) Research Report –
Task 7) Business Case –

D. CRITICAL PATH PROJECT MILESTONES (MILESTONE PLAN/ STATUS)

As a part of the approved SOW, the Applicant shall develop a Milestone Plan that shall serve as the baseline for tracking performance of the project and shall identify critical path project milestones for each NAC partner (no less than 2 milestones per calendar year) over the entire project.

During project performance, the CBDT Lead shall report the Milestone Status as part of a required monthly Progress Report via email to DOE. The Milestone Status shall present actual performance in comparison with Milestone Plan, and include:

(1) the **actual** status and progress of the project,
(2) specific progress made toward achieving the project's critical path milestones, and,
(3) any proposed changes in the projects schedule required to complete critical path milestones.

E. DELIVERABLES

The following reports shall be submitted as detailed in Section I.C. Additionally, the monthly CBDT progress reports and financial statements detailing Federal and applicant cost share expenditures for each NA Team participant shall be provided. The final research report and individual case study reports for each building shall be a laboratory published, peer reviewed report for public distribution.

- Design/Redesign Plan for each Newly Constructed or Retrofitted Building
- Monitoring/Performance Verification Plan for each Newly Constructed Building
- Case Study for each Newly Constructed or Retrofitted Building
- Annual and Final Research Report
- Business Case for each Newly Constructed or Retrofitted Building

F. BRIEFINGS/TECHNICAL PRESENTATIONS

The project team shall prepare detailed briefings for presentation to the DOE Project Officer at DOE Headquarters in Washington, DC or the NETL facility located in Pittsburgh, PA or Morgantown, WV. Briefings shall explain the plans, progress, and results of technical efforts.

The CBDT Lead shall provide and present a technical paper(s) at the DOE/NETL Annual NEA Meeting to be held at DOE Headquarters in Washington, DC or other location specified by the DOE Project Officer.

The CBDT Lead shall provide and present a technical report at the DOE/NETL Peer Review Meeting (usually in conjunction with the NEA annual meeting) to be held at DOE Headquarters in Washington, DC or other location specified by the DOE Project Officer.

Save this plan in a single file named " SOW.pdf "

b. Project Management Plan. This plan should be formatted to include the following sections with information as described below:

A. Executive Summary: Provide a description of the project that includes the objective, project goals, and expected results. For purposes of the application, this information is included in the Project Narrative and should be simply copied to this document for completeness, so that the Project Management Plan is a stand-alone document.

B. Risk Management: Provide a summary description of the proposed approach to identify, analyze, and respond to perceived risks associated with the proposed project. Project risk events are uncertain future events that, if realized, impact the success of the project. As a minimum, include the initial identification of significant technical, resource, and management issues that have the potential to impede project progress and strategies to minimize impacts from those issues.

C. Milestone Log: Provide milestones for each budget period (or stage) of the project. Each milestone should include a title and planned completion date. Milestones should be quantitative and show progress toward budget period and/or project goals.

[Note: During project performance, the Recipient shall report the Milestone Status as part of the required monthly Progress Report. The Milestone Status must present actual performance in comparison with Milestone Log, and include:

(1) the **actual** status and progress of the project,
(2) specific progress made toward achieving the project's milestones, and,
(3) any proposed changes in the project's schedule required to complete milestones.

D. Funding and Costing Profile: Provide a table (the Project Funding Profile) that shows, by budget period or stage, the amount of government funding going to each project team member. Also, provide a table (the Project Costing Profile) that projects, by month, the expenditure of government funds for the first budget period, at a minimum.

E. Project Timeline: Provide a timeline of the project (similar to a Gantt chart) broken down by each task and subtask, as described in the Statement of Work. The timeline for each task must include a start date and an end date. The timeline

must also show interdependencies between tasks and include the milestones that are identified in the Milestone Log (Section C).

F. Success Criteria at Decision Points: Provide success criteria for each decision point in the project, including go/recycle/no-go decision points and the conclusions of budget periods and the entire project to date. The success criteria should be objective and stated in terms of specific, measurable, and repeatable data. Usually, the success criteria pertain to desirable outcomes, results, and observations from the project.

[Note: As the first task in the Statement of Work, successful applicants shall revise the version of the Project Management Plan that is submitted with their application by including details from the negotiation process. This Project Management Plan must be updated by the Recipient as the project progresses, and the Recipient must use this plan to report schedule and budget variances.]

Save this plan in a single file named " PMP.pdf "

c. Commitment Letters from Third Parties

(1) Contributing to Cost Sharing. If a third party, (i.e., a party other than the organization submitting the application) proposes to provide all or part of the required cost sharing, the applicant must include a letter from the third party stating that it is committed to providing a specific minimum dollar amount of cost sharing. The letter should also identify the proposed cost sharing categorical expense type (e.g., cash, services, travel) to be contributed. Letters must be signed by the person authorized to commit the expenditure of funds by the entity and must be provided in PDF format.

(2) Participating as an NAC. Letters providing evidence of corporate commitment to increase building stock energy efficiencies to the levels identified in this Research Call must be provided. Additionally, participating NACs must also provide evidence that they are committed to fulfill all the NAC responsibilities (e.g., building construction, retrofit, long-term monitoring) previously identified.

Save this plan in a single file named " CLTP.pdf "

d. Senior/Key Personnel: Beginning with the Project Director/Principal Investigator (PD/PI), provide a profile for each senior/key person proposed. A senior/key person is any individual who contributes in a substantive, measureable way to the scientific/technical development or execution of the project, whether or not a salary is proposed for this individual. Subawardees and consultants must be included if they meet this definition. For each senior/key person provide:

Biographical Sketch.
Complete a biographical sketch for each senior/key person. The biographical information for each person must not exceed 2 pages.

Education and Training. Provide undergraduate, graduate and postdoctoral training, institution, major/area, degree, and year.

Research and Professional Experience: Beginning with the current position list, in chronological order, professional/academic positions with a brief description.

Publications. Provide a list of up to 10 publications most closely related to the proposed project. For each publication, identify the names of all authors (in the same sequence in which they appear in the publication), the article title, book or journal title, volume number, page numbers, year of publication, and website address if available electronically.

Patents, copyrights, and software systems developed may be provided in addition to or substituted for publications.

Synergistic Activities. List no more than 5 professional and scholarly activities related to the effort proposed.

Save this plan in a single file named " SKP.pdf "

e. Current, Pending, and Recent Past Support: The CBDT Lead must provide a detailed account of all current, pending, and recent past (i.e., within the last 12 months) work conducted for each NAC participating in the proposed project.

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C. SUBMISSIONS FROM SUCCESSFUL APPLICANTS

If selected for award, DOE reserves the right to request additional or clarifying information for any reason deemed necessary, including, but not limited to:

- Indirect cost information
- Other budget information
- Name and phone number of the Designated Responsible Employee for complying with national policies prohibiting discrimination (See 10 CFR 1040.5)
- Representation of Limited Rights Data and Restricted Software, if applicable
- Environmental Questionnaire

D. SUBMISSION DATES AND TIMES

1. Pre-application Due Date

Pre-applications are not required.

2. Application Due Date

Applications should be received by 7/15/2008, not later than 11:59:59 PM Eastern Time. You are encouraged to transmit your application well before the deadline. APPLICATIONS RECEIVED AFTER THE DEADLINE WILL NOT BE REVIEWED OR CONSIDERED FOR AWARD.

SECTION V: EVALUATION AND SELECTION

A. CRITERIA

1. INITIAL REVIEW CRITERIA

Prior to a comprehensive merit evaluation, DOE shall perform an initial review to determine that (1) the applicant is eligible for an award; (2) the information required by the Research Call has been submitted; (3) all mandatory requirements are satisfied; and (4) the proposed project is responsive to the objectives of the Research Call.

Proposals shall be judged on demonstrated experience in designing, constructing, and commissioning high performance commercial buildings. Experience directly with buildings in the specific target markets proposed is a plus. Cost share less than 20% will result in rejection of the proposal (cost share may not include equipment, materials, or software); cost share in excess of 20% will be considered a plus. The ability to communicate results of this research (subject to confidentiality restrictions) is an essential part of this project. The applicant should provide demonstrated involvement in one or more national associations that provide networking and communication of building issues and research results as well as demonstrated experience with developing systems integrated solutions to energy efficient buildings. The proposed project team shall also be evaluated on the extent to which they solve complex problems with innovative solutions and develop innovative equipment or systems. Proprietary company information, software, and patent rights shall remain with the contractor subject to certain government restrictions.

2. MERIT REVIEW CRITERIA

Applications submitted in response to this Research Call that pass the Initial Review shall be evaluated and scored in accordance with the criteria and weights listed below:

Criterion 1: Technical Merit and Implementation **30%**

- Validity of the proposed approach, the likelihood of success, and the scientific merit of the strategies proposed.

- Reasonableness of the planned approach to evaluate commercial systems and whole building integration concepts and analysis methods. Considerations will include the overall value and benefits as envisioned from the perspective of builders, contractors, building owners, occupants/patrons, and DOE.

- Quality of the plan described to aggressively pursue cost-effective energy savings technologies and systems meeting NAC business needs. Adequacy of detail for individualized strategies to be implemented for NAC-unique building and/or business needs.

- Degree of energy savings levels expected that exceeds the minimum required under this Research Call (*i.e., 30% for retrofit and 50% for new construction focused on Retailer or*

Commercial Properties; 20% for retrofit and 30% for new construction focused on Energy Smart Hospitals – energy savings above ASHRAE Standard 90.1-2004).

- Viability and practicality of proposed approach to be readily accepted by other companies or organizations unassociated with the application.

- Extent to which the results of this research will lead to others advancing building energy efficiencies and standard design practices.

- Completeness, practicality, and adequacy of plans to disseminate results through appropriate gateways of the markets and/or institutional alliances so that positive results may be replicated throughout the building industry. Considerations will include the adequacy of strategies to manage intellectual property rights.

- Reasonableness of proposed labor hours, labor categories, travel, consultants, and subcontractors as they apply to the performance of the proposed project.

- Comprehensiveness and likelihood of project success as it relates to technical milestones for each stage of the proposed project with special emphasis on the descriptive, qualitative, and especially quantitative milestone aspects.

- Thoroughness and adequacy of the proposed Statement of Work (SOW) and project objectives.

- The degree to which the proposed technical approach is innovative and relevant to the stated program objectives.

- The extent to which the proposed project will contribute to the eventual achievement of DOE's BTP net-zero-energy building goal.

- Likelihood of the proposed project to contribute to achievement of DOE's BTP net-zero-energy building goal earlier than planned.

Criterion 2: Commercial Building Design Team (CBDT) Roles and Capabilities 25%

- Depth of applicant's experience in management of activities or programs relevant to commercial building applications for the proposed target market(s).

- Number and quality of the applicant's relevant past relationships with teams involved in the commercial building industry with emphasis on energy efficient designs, technologies, and improvements.

- Adequacy of the proposed team's expertise pertaining to all necessary elements of building energy efficiency (e.g., HVAC, Lighting, Controls, Monitoring, A/E Design) for the proposed target market. Of particular consideration will be the number of builders, developers, and other design professionals committed to partnering with the CBDT Lead for

the National Accounts program.

- Adequacy of the proposed team's abilities to achieve the project goals proposed.

- Each CBDT must include employees or subcontracted personnel with the following minimum skills and/or qualifications:
    - a building energy rater simulation expert capable of conducting building performance simulation calculations according using EnergyPlus;
    - an engineer or architect with education and at least five (5) years experience in commercial building design;
    - a professional with at least five (5) years of commercial building construction experience;
    - a professional with at least five (5) years experience in the specification, design, and installation of heating, ventilation, and air conditioning systems in commercial buildings;
    - a professional with at least five (5) years experience in the specification, design, and installation of lighting systems in commercial buildings;
    - a professional with at least five (5) years experience in building science including heat and mass transfer (e.g., moisture and vapor transfer) of commercial buildings.
    - The availability of proposed key personnel to participate in and complete the proposed project.

Criterion 3: National Account Company (NAC) Participation 30%

- Quality of proposed NAC partners. Considerations will include the number, locations, type(s), size (i.e., sq. ft. building area), and plans for future construction and/or retrofit of existing NAC buildings that are the focus of this project.

- Clear evidence of corporate commitment to the proposed project and ultimate goals through team member participation and partner letters of commitment.

- Clear evidence that NACs are committed to provide required cost sharing of the total proposed project cost.

- Degree of potential energy savings to be realized through NAC implementation of project practices and procedures.

- Clear, documented evidence of corporate commitment to advance energy efficiency of building stock to the levels specified in this Research Call (demonstrated in public announcements and reports with reference, e.g., URL, that may be accessed by reviewers).

- Clear commitment to construct at least 1 building according to the design and/or specifications developed during this project.

- Clear commitment to retrofit at least 1 energy inefficient building according to the redesign and/or specifications developed during this project.

- Duration for monitoring the building energy performance and demand after new construction and/or before and after retrofit modification with evidence of clear corporate commitment to support this.

- Appropriateness of current, pending, and recent past (i.e., within the last 12 months) involvement with the CBDT Lead in work similar to Task 3 – Design/Redesign and Task 4 – Performance Verification.

Criterion 4: Project Management, Including Risk Management 15%

- Quality and completeness of the management systems proposed for the project and complementing the NEA program. Considerations will include procedures/planned approach for coordination among CBDT members, each NAC, and DOE.

- Soundness of the Project Management Plan with respect to proposed tasks and organizational structure to achieve project objectives and overall approach to risk management.

- Likelihood of achieving project objectives through realistic milestones and logical task structure.

- Clarity, completeness, and adequacy of the proposed SOW and schedule.

- Reasonableness of time allocations outlined in the manpower matrix; effectiveness of the proposed roles and responsibilities of outlined personnel in order to accomplish the SOW.

- Clear evidence of abilities to successfully perform project management functions on projects similar in complexity and scope as well as reasonableness of principal investigator's time allotment to fulfill project management requirements.

3. OTHER SELECTION FACTORS

These factors, while not indicators of the Application's merit, e.g., technical excellence, cost, Applicant's ability, etc., may be essential to the process of selecting the application(s) that, individually or collectively, will best achieve the program objectives. Such factors are often beyond the control of the Applicant. Applicants should recognize that some very good applications may not receive an award because they do not fit within a mix of projects which maximizes the probability of achieving the DOE's overall R&D objectives. Therefore, the following Program Policy Factors may be used by the Selection Official to assist in determining which of the ranked application(s) shall receive DOE funding support.

1. It may be desirable to select projects from a diversity of types and/or sizes of organizations. This includes, but is not limited to, limiting the number of applications selected from one applicant organization.

2. It may be desirable to select a group of projects which represent a diversity of methods,

approaches, applications, or kinds of work. This includes, but is not limited to, consideration of ongoing projects in addition to the applications received through this Research Call.

3. It may be desirable to support complementary and/or duplicative efforts or projects, which, when taken together, will best achieve the research goals and objectives.

4. It may be desirable (because of the nature of energy sources and potential energy savings, the type of projects envisioned, or limitations of past efforts) to select a group of projects with a broad or specific geographic distribution.

5. It may be desirable to select projects based upon target markets proposed in order to provide a balanced programmatic effort and/or a variety of different technical perspectives.

6. It may be desirable to select projects for award that will complement or enhance existing or planned work identified by EERE.

7. It may be desirable to select project(s) for award of less technical merit than other project(s) if such a selection will optimize use of available funds by allowing more projects to be supported without detriment to the overall objectives of the program.

8. It may be desirable to select project(s) that reduce Federal investment and maximize corporate commitment as demonstrated by cost share levels or other resource leveraging (e.g., in-kind contributions) that exceed the required 20%.

The above factors may be independently considered by the Selection Official in determining the optimum mix of applications that shall be selected for support. These policy factors provide the Selection Official with the capability of developing, from the competitive Research Call, a broad involvement of organizations and organizational ideas, that both enhance the overall research effort and upgrade the program content to meet the goals of the DOE.

B. REVIEW AND SELECTION PROCESS.

1. MERIT REVIEW

Applications that pass the initial review will be subjected to a merit review in accordance with the guidance provided in the "Department of Energy Merit Review Guide for Financial Assistance and Unsolicited Proposals." This guide is available under Financial Assistance, Regulations and Guidance at http://management.energy.gov/documents/meritrev.pdf . Although these Research Call applications are not considered financial assistance, the established merit review procedures for financial assistance proposals shall be used.

2. SELECTION

The Selection Official will consider the merit review recommendation, program policy factors, and the amount of funds available.

3. DISCUSSIONS AND AWARD

The Government may enter into discussions with a selected applicant for any reason deemed necessary, including but not limited to: (1) the budget is not appropriate or reasonable for the requirement; (2) only a portion of the application is selected for award; and/or (3) special terms and conditions are required. Failure to satisfactorily resolve the issues will preclude award of the project.

C. ANTICIPATED NOTICE OF SELECTION AND AWARD DATES.

DOE anticipates notifying applicants selected for award by 8/15/2008 and making awards by 9/30/2008.

PART VI - OTHER INFORMATION

A. GOVERNMENT RIGHT TO REJECT OR NEGOTIATE

DOE reserves the right, without qualification, to reject any or all applications received in response to this announcement and to select any application, in whole or in part, as a basis for negotiation and/or award.

B. PROPRIETARY APPLICATION INFORMATION

Patentable ideas, trade secrets, proprietary, or confidential commercial or financial information (disclosure of which may harm the applicant) should be included in an application only when such information is necessary to convey an understanding of the proposed project. The use and disclosure of such data may be restricted, provided the applicant includes the following legend on the first page of the project narrative, and specifies the pages of the application which are to be restricted:

"The data contained in pages _____ of this application have been submitted in confidence and contain trade secrets or proprietary information, and such data shall be used or disclosed only for evaluation purposes, provided that if this applicant receives an award as a result of or in connection with the submission of this application, DOE shall have the right to use or disclose the data herein to the extent provided in the award. This restriction does not limit the government's right to use or disclose data obtained without restriction from any source, including the applicant."

To protect such data, each line or paragraph on the pages containing such data must be specifically identified and marked with a legend similar to the following:

"The following contains proprietary information that (name of applicant) requests not be released to persons outside the Government, except for purposes of review and evaluation."

C. EVALUATION AND ADMINISTRATION BY NON-FEDERAL PERSONNEL

In conducting the merit review evaluation, the Government may seek the advice of qualified non-Federal personnel as reviewers. The Government may also use non-Federal personnel to conduct routine, nondiscretionary administrative activities. The applicant, by submitting its application, consents to the use of non-Federal reviewers/administrators. Non-Federal reviewers must sign conflict of interest and non-disclosure agreements prior to reviewing an application. Non-Federal personnel conducting administrative activities must sign a non-disclosure agreement.