

**Prequalification Questionnaire - Fax to 972.421.1790**

(Please attach additional pages if necessary)

**General Information**

- 1a. Building name: \_\_\_\_\_  
1b. Building address: \_\_\_\_\_  
1c. City State Zip Code: \_\_\_\_\_  
1d. Facility engineering contact: \_\_\_\_\_ 1e. Position/Title: \_\_\_\_\_  
1f. Phone: \_\_\_\_\_ 1g. Fax: \_\_\_\_\_ 1h. Email: \_\_\_\_\_  
1i. Conditioned gross square feet: \_\_\_\_\_ 1j. Total square feet, (bldg, garage, etc): \_\_\_\_\_  
Building type (select one): 1k. \_\_\_ Education 1l. \_\_\_ Food sales 1m. \_\_\_ Industrial/manufacturing  
1n. \_\_\_ Office 1o. \_\_\_ Lodging 1p. \_\_\_ Food service 1q. \_\_\_ Enclosed shopping 1r. \_\_\_ Religious worship  
1s. \_\_\_ Center/mall 1t. \_\_\_ Health care 1u. \_\_\_ Retail, mercantile, and service 1v. \_\_\_ Warehouse and storage  
1w. Hours of operations, M-F: \_\_\_\_\_ 1x. Hours of operations, S-S: \_\_\_\_\_  
1y. Age of building: \_\_\_\_\_

What equipment/system do you think are candidates for replacement or upgrade:

- \_\_\_ 1z. HVAC equipment \_\_\_ 1aa. Air distribution system \_\_\_ 1ab. Lighting (building, garage outside, etc.)  
\_\_\_ 1ac. Building automation controls \_\_\_ 1ad. Envelope (windows, roof, doors, etc.) \_\_\_ 1ae. Solar or other renewable  
\_\_\_ 1af. Building equipment (pumps, motors, elevators, laundry, etc.) 1ag. Other \_\_\_\_\_

- 1ah. What is the roof type \_\_\_\_\_ Is the roof insulated? 1ai. \_\_\_ Yes 1aj. \_\_\_ No  
Are the walls insulated? 1ak. \_\_\_ Yes 1al. \_\_\_ No  
1am. What energy or operations and maintenance (O&M) upgrades have been completed in the last five years? \_\_\_\_\_

**Utility Information**

- Type of fuel(s) (select all that apply): \_\_\_ 2a. Electricity \_\_\_ 2b. Fuel oil \_\_\_ 2c. Natural gas \_\_\_ 2d. Coal  
If your state is deregulated, are you buying power through an Aggregator?  
2e. \_\_\_ N/A 2f. \_\_\_ Yes 2g. \_\_\_ No

Please check the preferred method you will provide UEALLC with your historical utility data:

- 2h. \_\_\_ I will furnish copies of the last 12 consecutive months of data for all of the above accounts (Bills or spreadsheet).  
2i. \_\_\_ I will provide a Letter of Authorization (LOA) to Ultimate Energy Advisors, LLC (UEALLC), which permits UEALLC to contact your utility company for consumption information.  
2j. Please provide utility representative Point of Contact information. \_\_\_\_\_  
2k. What are the terms of your current utility contract? \_\_\_\_\_  
2l. What is your contract rate structure for electricity? \_\_\_\_\_  
2m. What is your contract rate structure for natural gas? \_\_\_\_\_  
2n. What is the Power Factor of the facility? \_\_\_\_\_

- Has Power Factor correction equipment been installed? 2o. \_\_\_ Yes 2p. \_\_\_ No  
Is there a Power Factor penalty charge within the electricity tariffs? 2q. \_\_\_ Yes 2r. \_\_\_ No

**O&M Information**

- Do you have an active preventive maintenance program? 3a. \_\_\_ Yes 3b. \_\_\_ No  
Do you have an active refrigerant recycling program? 3c. \_\_\_ Yes 3d. \_\_\_ No  
Do you have an active lighting maintenance program? 3e. \_\_\_ Yes 3f. \_\_\_ No

**HVAC Information**

- What is the cooling system? (select one) 4a. \_\_\_ Chiller(s) 4b. \_\_\_ Outdoor condenser units  
4c. \_\_\_ Roof top package units 4d. \_\_\_ DX Split systems or heat pumps  
4e. What is the average age of the cooling units? \_\_\_\_\_  
What is the primary type of heating (select one)? 4f. \_\_\_ Boiler(s) 4g. \_\_\_ Gas unit heaters or infrared heaters  
4h. \_\_\_ Electric heaters 4i. \_\_\_ DX Split systems or heat pumps 4j. What is the average age of the heating units? \_\_\_\_\_

**BAS/EMCS Information**

If there is an energy management control system (EMCS), do you think it is programmed and working properly? 5a. \_\_\_N/A 5b. \_\_\_Unsure 5c. \_\_\_Yes 5d. \_\_\_No  
What type is the EMCS? 5e. \_\_\_None 5f. \_\_\_Low voltage 5g. \_\_\_Unknown 5h. \_\_\_Pneumatic  
5i. \_\_\_Direct digital control (DDC)  
5j. How old is the EMCS \_\_\_\_\_ 5k. What brand is the EMCS? \_\_\_\_\_

**Lighting Information**

Have your fluorescent lamps been upgraded to T8 fluorescent lamps?  
6a. \_\_\_N/A 6b. \_\_\_Partially 6c. \_\_\_Yes 6d. \_\_\_No  
Have your magnetic ballasts been upgraded to electronic ballasts?  
6e. \_\_\_N/A 6f. \_\_\_Partially 6g. \_\_\_Yes 6h. \_\_\_No  
Have your incandescent lights been upgraded to compact fluorescent lamps?  
6i. \_\_\_N/A 6j. \_\_\_Partially 6k. \_\_\_Yes 6l. \_\_\_No  
What are the approximate quantities, primary types and wattages of lights?  
Flourescents 6m. Watts: \_\_\_\_\_ 6n. Inside \_\_\_ 6o. Outside \_\_\_ 6p. App. quantity \_\_\_\_\_  
Incadescents 6q. Watts: \_\_\_\_\_ 6r. Inside \_\_\_ 6s. Outside \_\_\_ 6t. App. quantity \_\_\_\_\_  
Metal Halide 6u. Watts: \_\_\_\_\_ 6v. Inside \_\_\_ 6w. Outside \_\_\_ 6x App. quantity \_\_\_\_\_  
Mercury Vapor 6y. Watts: \_\_\_\_\_ 6z. Inside \_\_\_ 6aa. Outside \_\_\_ 6ab. App. quantity \_\_\_\_\_  
High Pressure Sodium 6ac. Watts: \_\_\_\_\_ 6ad. Inside \_\_\_ 6ae. Outside \_\_\_ 6af. App. quantity \_\_\_\_\_  
Low Pressure Sodium 6ag. Watts: \_\_\_\_\_ 6ah. Inside \_\_\_ 6ai. Outside \_\_\_ 6aj. App. quantity \_\_\_\_\_  
In general are light levels adequate? 6ak. \_\_\_Yes 6al. \_\_\_No  
If occupancy sensors installed are most of them working properly? 6am. \_\_\_N/A 6an. \_\_\_Yes 6ao. \_\_\_No  
Are the lights frequently left on when nobody is in the space(s)? 6ap. \_\_\_Yes 6aq. \_\_\_No

**Metering Information**

Is any utility being metered? 7a. \_\_\_Yes 7b. \_\_\_No, If so, by whom? 7c. \_\_\_\_\_  
7d. Where is the electric meter located? \_\_\_\_\_  
7e. What is the peak kW (kVA) during the past year? \_\_\_\_\_  
7f. What is the maximum ampere load of the main building electrical feed(s)? \_\_\_\_\_  
Is the existing electric meter an electronic Interval Demand Meter (IDR)? 7g. \_\_\_Yes 7h. \_\_\_No

**Accounting Information**

To be filled out by the comptroller/accounting:  
8a. What is the Cap Rate you use for Real Estate Purchases? \_\_\_\_\_  
8b. What is the Current Value of the Property? \_\_\_\_\_  
8c. What is the Current Net Cash Flow of the Property? \_\_\_\_\_  
What method do you used to evaluate capital projects?  
Payback 8d. \_\_\_Yes 8e. \_\_\_No. If yes what is the standard payback period you look for? 8f. \_\_\_\_\_  
Internal Rate of Return 8g. \_\_\_Yes 8h. \_\_\_No, If yes what rate of return do you look for? 8i. \_\_\_\_\_  
Cap Rate 8j. \_\_\_Yes 8k. \_\_\_No. If yes, what Cap Rate do you look for? 8l. \_\_\_\_\_  
8m. \_\_\_Other – Please explain: 8n1. \_\_\_\_\_  
8n2. \_\_\_\_\_

**Specific Use Information**

9a. What type of manufacturing, processing, refrigeration (if applicable) equipment do you use in your facilities along with energy consumption and or ratings, e.g., kW/ton, COP, SEER, ammonia or fluorocarbon (Freon) equipment, etc. \_\_\_\_\_  
9b. Are there special federal, state, or municipal codes for compliance on how they must operate or how these codes would affect retrofitting of them? \_\_\_\_\_  
What are the - square feet? 9c. \_\_\_\_\_, acreage? 9d. \_\_\_\_\_, 9e. plat of all land surrounding the facilities that is owned or operated by the facility that may act as flex space for on-site power generation or other Energy Conservation Measures? \_\_\_\_\_  
9f. If applicable, what is the existing land used for? \_\_\_\_\_

9g. Do you have an interest in a particular energy technology such as co-generation, solar, ground water source heat pumps (geothermal), etc.? \_\_\_\_\_

Is there are steam processes? 9h.  Yes 9i.  No. If yes, what is the operating pressure? 9j. \_\_\_\_\_

9k. boiler size? \_\_\_\_\_. Are there pneumatics used for operations and processes? 9l.  Yes 9m.  No.

If yes, is there a pneumatic preventive maintenance in place to repair leaks? 9n.  Yes 9o.  No

9p. What is the size of the pneumatic equipment? \_\_\_\_\_

Are there daily wash downs in the plant, e.g., food processing plants? 9q.  Yes 9r.  No

Do the equipment and processes have to adhere to FDA cleanliness requirements? 9s.  Yes 9t.  No

Is refrigeration equipment air cooled? 9u.  Yes 9v.  No, evaporative cooled? 9w.  Yes 9x.  No

9y. What is water cost? \_\_\_\_\_ 9z. What is building water usage? \_\_\_\_\_

Is there potential for using building water supply to improve efficiency of HVAC equipment?  
9aa.  Yes 9ab.  No.

Is the cooling tower water consumption being metered? 9ac.  Yes 9ad.  No

Are chemicals being used for the cooling towers? 9ae.  Yes 9af.  No

Is there a neighbor facility that has a high water usage? 9ag.  Yes 9ah.  No

9ai. How many dock doors are there? \_\_\_\_\_ 9aj. What is the orientation of the doors? \_\_\_\_\_

9ak. If there are dock doors, what is the type of seal? \_\_\_\_\_

9al. What is the condition of the seals? \_\_\_\_\_

What is the percent of time of day and night the dock doors are used?  
9am. Day \_\_\_\_\_ 9an. Night \_\_\_\_\_

Is there a humidity problem within the facility? 9ao.  Yes 9ap.  No

9aq. If there is an anteroom to a freezer, what are the specifications? \_\_\_\_\_

9ar. What is the ventilation load in the anteroom? \_\_\_\_\_

9as. What is the product through put in lbs/day? \_\_\_\_\_

Is refrigeration equipment inside facility? 9at.  Yes 9au.  No. On rooftop? 9av.  Yes 9aw.  No

Are air handler fans on 24/7? 9ax.  Yes 9ay.  No On schedule? 9az.  Yes 9ba.  No

Are air handler fans on VFDs? 9bb.  Yes 9bc.  No

Are you able to shift or stop operations/processes during summer afternoons with the intent of averting a new higher peak demand. 9bd.  Yes 9be.  No

### LEED Existing Buildings O&M Basic Criteria - v 2009

**Before committing a property to LEED, the following criteria should be met:**

#### Must Meet Basic LEED-EBOM Requirements

- 10a.  Buildings must be fully occupied for at least 12 months preceding application. Vacant tenant space of up to 25% is allowed when time-averaged over the previous 12 months.
- 10b.  100% of the building's total floor area must be included, with the following exception: up to 10% can be excluded if operations are under separate management control.
- 10c.  Buildings must be in compliance with all Federal, state and local environmental laws, including those addressing asbestos, PCBs, water discharge and waste management.

#### Meet or Plan to Meet LEED-EBOM Prerequisites

Prerequisites are the mandatory elements of any LEED Rating System that establish minimum policies, practices and levels of performance in areas vital to the achievement of overall sustainability.

- 11a.  Existing HVAC&R systems contain no CFC-based refrigerants.
- 11b.  Planned 11c. Date of scheduled completion: \_\_\_\_\_
- 11d.  Existing The building has an ENERGY STAR performance rating of 71 OR If the building is not one of the 12 space types eligible for an ENERGY STAR score, then the building must be 21% above the national median for typical buildings of similar type.
- 11e.  Planned 11f. Date of scheduled completion: \_\_\_\_\_
- The following have been conducted or are planned on the building:
- 11g.  Existing 11h.  An ASHRAE Level I Energy Audit. 11i. Date of Report: \_\_\_\_\_

- 11j. \_\_\_ Planned      11k. \_\_\_ An ASHRAE Level II Energy Audit. 11l. Date of Report: \_\_\_\_\_  
 11m. \_\_\_ Last Commissioning.      11n. Date of Report: \_\_\_\_\_  
 11o. Name of Commissioning Agent: \_\_\_\_\_
- 11p. \_\_\_ Existing Plumbing fixtures in the building meet the following flush and flow rates:  
 11q. \_\_\_ Planned      11r. \_\_\_ Water Closets: 1.6 or less gallons per flush (gpf)  
 11s. \_\_\_ Lavatory Faucets: 0.5 gallons per minute (gpm)  
 11t. \_\_\_ Urinals: 1.0 or less gpf 11u. Date of scheduled completion: \_\_\_\_\_
- 11v. \_\_\_ Existing The building meets the minimum requirements of the voluntary consensus standard ASHRAE 62.1-2007, Ventilation for Acceptable Indoor Air Quality  
 11w. \_\_\_ Planned Mechanical ventilation systems shall perform according to the Ventilation Rate Procedure.  
 11x. Date of scheduled completion: \_\_\_\_\_
- 11y. \_\_\_ Existing Smoking is prohibited in the Building and within 25 feet of ALL entries, outdoor  
 11z. \_\_\_ Planned Air intakes and operable windows.
- or**
- Building permits smoking; however, smoking is prohibited in:  
 11aa. \_\_\_ portions of tenant spaces not designated as a smoking space  
 11ab. \_\_\_ all other building areas served by the same HVAC system  
 11ac. \_\_\_ common areas used by tenant occupants
- and**
- 11ad. \_\_\_ there is no migration of environmental tobacco smoke by either mechanical or natural ventilation from other areas of the building

**Additional Information:**

- ENERGY STAR Labeled      12a. \_\_\_ Yes      12b. \_\_\_ No  
 12c. Date Statement of Energy Performance Stamped by Professional Engineer: \_\_\_\_\_  
 12d. Current ENERGY STAR Rating: \_\_\_\_\_ 12e. Date Rating Achieved: \_\_\_\_\_

**Who is responsible for loading ENERGY STAR data in Portfolio Manager?**

- 13a. Name: \_\_\_\_\_ 13b. Number: \_\_\_\_\_ 13c. Email: \_\_\_\_\_

**Please describe who manages the property and their relationship to the owner. Who (name of company or in-house) handles the following services at the property:**

- 14a. Pest Control: \_\_\_\_\_  
 14b. Janitorial: \_\_\_\_\_  
 14b. Janitorial Supply: \_\_\_\_\_  
 14d. Landscape Services: \_\_\_\_\_  
 14e. Waste: \_\_\_\_\_  
 14f. Recycling: \_\_\_\_\_  
 14g. Construction: \_\_\_\_\_

**The building has a recycling program covering the following (check item):**

- 15a. \_\_\_ Ongoing Consumables: paper, toner cartridges, glass, plastics, cardboard, old corrugated cardboard, food waste and metal.  
 15b. \_\_\_ Durable Goods: electronics, appliances and furniture.  
 15c. \_\_\_ Construction Waste: wall studs, insulation, doors, drywall, ceiling tiles, carpet and other flooring materials.  
 15d. \_\_\_ All mercury-containing lamps  
 15e. \_\_\_ All portable dry-cell types of batteries