

Bulk Energy Storage Scheduling and Dispatch Rights Request for Proposals

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APPENDIX C4

Permits

Successful bidders will be responsible for obtaining all necessary permits¹ to complete the project. It is the bidder’s responsibility to be familiar with all permitting requirements, including those of local (municipal), State and Federal authorities having jurisdiction. All costs related to permitting shall be included in the bidder’s Offer. Permitting requirements listed below must be supplied with Round 2 Offer and may be estimated for Round 1 Offer submission dependent upon Bidder qualification status; any permitting information required for submission in Round 1 will be denoted with **(Round 1)**. Estimates must be refined as much as possible for Round 2 submission. Please clearly indicate any/all Round 2 information that changed from Round 1. Please mark all confidential information accordingly. Bidder shall be fully responsible for all permit conditions and full compliance.

1. Bidders shall submit with the Offer a Permitting Plan in the following format **(Round 1)**:

No.	Permit Type / Name	Issuing Agency	Status of Permit	Expiration Dates (As Applicable)	Actual or Expected Completion Date	Additional Information
1						
2						
3						

2. Provide evidence of completed permits as required by any/all Fire Departments with jurisdiction within the CHGE service territory.
3. Provide copies of all required UL certifications, including UL 1973, UL 1741, UL 9540 and UL 9540A. If not already achieved at the time of the bid, provide a detailed description of the steps and schedule to achieve UL9540A compliance and certification.
4. Provide copies of any additional system certifications required by Governmental Authorities.

For more information regarding New York State storage permitting, please see the statewide Battery Storage Permitting Guide².

¹ Specific definitions for “permits”, “permit requirements” and related terms can be found in Appendix D1 Energy Storage Services Agreement, Exhibit A Definitions.

² <https://www.nyseda.ny.gov/All-Programs/Programs/Clean-Energy-Siting/Battery-Energy-Storage-Guidebook>

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Project Milestone Schedule

A Project milestone schedule will help the CHGE review team evaluate the Bidder’s understanding of the energy storage Project development process in New York and the proposed Project’s likelihood of meeting the requirement to have a Commercial Operation Date before December 31, 2025³. Entries are required for Round 2 Offer submittal but may be estimated for Round 1 Offer submittal qualification status of Bidder dependent; any information required for submission in Round 1 will be denoted with (**Round 1**).

Provide a Project milestone schedule as shown in the table below⁴. See the Agreement (Appendix D1) for specific Milestone and Critical Path Milestone requirements. Include any specific milestones that may need to be met specifically by CHGE or any other 3rd Party organization; insert these without changing the existing numbered structure – for example, use alphanumeric combinations (2A, 7B, etc.) and highlighted cells to illustrate additions.

No.	Milestones	Date
1	Obtain Site Control	
2	Execution of agreement and payment of fee to perform a System Reliability Impact Study (“SRIS”)	
3	File for all material Permits for the Project needed to meet the Contract Capacity	
4	Receive a completed SRIS Study (or equivalent) accepted by NYISO Operating Committee sufficient to meet the Contract Capacity of the Project	
5	Execution of Facilities Study Agreement and payment of fee to join a Class Year Interconnection Facilities Study	
6	Receive permitting approval(s) from the Fire Department Having Jurisdiction and the Department of Buildings in the Municipality Having Jurisdiction, as applicable	
7	Execute an equipment (turbine/panel/ energy storage system, etc.) supply contract	
8	Execute an Engineering, Procurement and Construction (EPC) contract	
9	Deliver full Notice to Proceed under EPC contract and begins construction of the Project	
10	Execute the Interconnection Agreement with Transmission Owner that is suitable to interconnect the Project and to ensure the deliverability of installed capacity up to the Contract Capacity	

³ As required in the New York Public Service Commission Case 18-E-0130 Orders issued and effective on December 13, 2018, and April 16, 2021.

⁴ This table can be found at its source in Appendix D1 _ Energy Storage Services Agreement, Exhibit F “Milestone Schedule”

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11	Energy storage system Delivery onsite	
12	Obtain all Permits for the Project needed to achieve Substantial Completion	
13	Achieve Substantial Completion	
14	Receive any additional Permits necessary to achieve Commercial Operation	
15	Final Completion (must be prior to 12/31/2025)	

1. Discuss any risks or challenges anticipated with the overall Project and milestone schedule including plans to address/mitigate.