PEER

GUIDE TO CERTIFICATION

August 2021

CONGRATULATIONS ON YOUR DECISION TO PURSUE PEER CERTIFICATION FOR YOUR PROJECT!

PEER Certification is a continuous improvement and verification process for the overall sustainability of your electricity delivery system design and operations.

PEER *certification* is available for existing projects that have been operational for at least one year. Projects must apply for certification under one of three project types:

- **Utility and City**: The project must have one or more substations or circuits that have metered customers within the project boundary.
- **Campus:** The project must have either:
  - one building with at least one main meter and submeter, or
  - more than one building with individual meters AND/OR sub meters, within the project boundary.
- **Transit:** The project must have at least three adjacent stations with at least one receiving substation, and each station within the project boundary must be metered individually. The project must consider both traction and non-traction loads.

PEER *precertification* is an optional pathway (for a fee) available for projects that are at the design stage or as much as 80 % of completion of project construction. This is a high-level review of the project's intended strategy for certification. View the [Precertification Guidance document on the Resources webpage](#) for more information on precertification review process, requirements, and more.

PEER certification involves four steps:

1. **Register** your project by downloading and completing key forms and submitting payment.
2. **Apply** by submitting a certification application and paying the certification review fee. You may submit part of the application (design credits only) at the end of a project's design phase and the rest at the conclusion of at least one year of operation (via the split review process) or submit entire application at the end of one year of operations (via the standard review process).
3. **Review** by Green Business Certification Inc. (GBCI). There are two pathways available – split review or standard review, see 'Review' section below for details.
4. **Certify.** Receive the review decision. If you've earned PEER certification: congratulations!

If you need assistance at any time, please [call](#) or [email us](#). [Visit our website](#) for a quick overview of PEER.

REGISTER

Registration is an important first step in the PEER process, signifying your intent to pursue PEER precertification and/or certification.

Before you begin, you'll want to make sure that your project meets the minimum [requirements](#) that make a project appropriate for pursuing PEER.

To get started with your project, you will use the [PEER Online platform](#), to provide registration information, sign the certification agreement and remit the registration fee. Once you've

completed these steps, your project will be accessible in [PEER Online](#) and you'll be assigned a dedicated **PEER Coach.**

From here, you can assemble your certification project team and the documentation process begins!

Project Team Roles

Individuals on your certification project team will be called on to perform certain roles throughout the PEER certification process. Here's a rundown of who's who so you can select your team wisely:

Owner: The owner of the project is the person (or entity) who has the authority to hold and control the real and personal property and accepts (or authorizes the acceptance of) the certification agreement. While there may be multiple owners for a particular project (if so, please submit a [Confirmation of Primary Owner's Authority Form](#)), we ask that you identify a single individual to administer the certification process. Big takeaway: the owner has ultimate control over the PEER certification application, meaning that GBCI will respond to the owner regarding the administration of the project over any other member of the project team.

Agent: The agent is the person (or entity) who is granted actual authority by the owner to register the project and accept the certification agreement. If you are using this option, remember to upload a signed [Confirmation of Agent's Authority Form](#).

Project Administrator: This team member acts as a project manager, overseeing the PEER project as well as the project team members who are responsible for certain tasks, credits, or prerequisites. The project administrator plays a key quality role by checking that the PEER application is complete and accurate before submitting the project to GBCI for review and accepting the review results once the review is complete.

APPLY

The next step is to get your project ready to submit an application for PEER certification. Working with your project team, you will identify PEER prerequisites and credits in the reference guide to pursue and assign them to project team members. Your team will then collect information, perform calculations and analysis, and prepare documentation demonstrating your achievement of the prerequisites and your selected credits.

Application

The PEER rating system includes comparisons to local benchmarks for reliability and environmental performance and these reference data sets are imbedded into corresponding calculators. If a project is not submitted for certification within three years of its registration date, the project team must utilize calculators that have a publish date within three years of application submission. *Please note applications that are submitted for PEER precertification or certification that contain calculators that are older than three years will not be accepted.* Requiring the use of recent reference data helps to ensure that the project is measured against current benchmarks.

At any time before submitting for precertification or certification, your team may elect to upgrade to the most current version of the calculators at your discretion.

PEER Coach

While you prepare your application for certification, you may have a few questions. Your registration gives project team's direct access to a dedicated PEER Coach who will be your point of contact within GBCI. While your project's consultant is the primary source for providing technical support about the PEER Rating System to your team, the PEER Coach can provide answers to technical questions about the PEER rating system and help clarify PEER requirements when you are unable to find an answer in published guidance, and/or when your project has a unique or complex scenario. The PEER Coach will also be able to direct your team to available resources and guidance that can be used while you prepare your application. You will have the option to request a one-hour call each month with your PEER Coach to discuss your prepared questions for real time feedback. Official rulings are not issued on these calls.

Remember, the PEER Coach is not a member of the project team. While your PEER Coach can provide answers to questions, they cannot complete the application on your behalf. Further, your PEER Coach is not permitted to provide recommendations on design or operational strategies that can be implemented on your project to meet PEER requirements. These are the types of functions that may be fulfilled by a consultant or other project team members.

Once your application is prepared, make sure to perform a rigorous quality check of your entire application before submitting for review. We suggest that you check that you have included all required information and open each file to verify that you have submitted the correct version of each document. Cross-check credits and prerequisites to make sure that you have reported common data points. Want more tips? Here are some characteristics common among high quality submissions:

- File attachments are clearly and intuitively named and labeled

- Only required documentation is submitted (if only a few pages of a large report are needed to provide the required credit/prerequisite information, highlight the relevant sections only, no need to submit more!)

- Concise narratives are included to describe project-specific circumstances (these are really helpful for the GBCI reviewer)

All finished? Ready, set, submit!

REVIEW

After you've submitted your application, GBCI will conduct a thorough technical review. But don't kick back yet – you'll need to be an active participant throughout the process.

GBCI offers two review paths for PEER projects: standard and split.

Standard Review:

The standard review path is where you'll submit your entire application (i.e., all the prerequisites and credits the project is pursuing). It will include two rounds of review – preliminary review and final review.

Split Review:

The split review is designed to let you know if your project is on the right path — allows you to submit part of your application at the end of your project's design phase (design credits identified in Appendix A) and the rest at the conclusion of at least one year of operation (operation credits and prerequisites identified in Appendix A). The Split Review process involves two rounds of review (preliminary and final) at Design phase and two rounds of review (preliminary and final) at the Operations phase.

If any changes occur to the project after the design review that might affect the point total, approach or credit compliance, those changes must be re-reviewed by GBCI. In these cases, documentation for the affected credits must be updated and submitted for one additional round of GBCI review during the operations phase.

While the type of review you'll undergo will vary depending on your sustainability goals, the specific needs of your project, the general review process is the same:

Part 1: Preliminary Review (included in certification fee)

- You will first submit your application for preliminary review. GBCI will check your application for completeness and compliance with PEER rating system prerequisites and attempted credits.
- GBCI will respond with its preliminary review within 25 business days, indicating which prerequisites and credits are anticipated to be awarded during final review (for standard path) or operations review (for split review path), which prerequisites and credits are pending and require additional information, or if the prerequisite or credit requirements cannot be met by the project, these will show up as denied.
- In a split review, if a design credit is marked as anticipated, it means that the project will earn it at the end of the operations phase once that design is implemented on-site. If it's marked as denied, in order to earn the credit, the project team will need to come up with a design alternative rather than proceeding with that design.
- Your team can accept the preliminary review results as final if you are satisfied, submit new or revised documentation, or attempt additional credits before submitting for final review.

Part 2: Final Review (optional, included in certification fee)

- The final review phase allows you to submit supplementary information or amend the application. GBCI suggests you submit these clarifications within 25 business days after receiving the preliminary review results.
- For standard review, GBCI will respond with a final PEER review report within 25 business days, marking prerequisites and attempted credits as either awarded or denied.
- For Split review, during design phase, the final review will only include credits that are anticipated, pending, or denied. It will not include any awarded credits or prerequisites. PEER certification is issued only after completion of final review of

the Operations phase review. No certification is issued after the final review of the Design phase.

- Like the preliminary review, you can either accept the review results as final, or revise your application and resubmit, this time as a supplemental review for a fee.

Part 3: Supplemental (appeal) Review (optional, fees apply)

- The supplemental review is a third, optional, review stage providing one additional round of review. This enables you to submit supplementary information, amend the application or add new credits not previously attempted. GBCI will review the pending or newly submitted prerequisites and credits.
- GBCI will respond with an updated PEER Certification Review Report within 25 business days, marking prerequisites and attempted credits as either awarded or denied.
- Like the final review, you can either accept the supplemental (appeal) review results as final or submit for additional supplemental (appeal) reviews. There is no cap on the number of supplemental (appeal) reviews you can receive.

Expedited review

In a time, crunch? Contact GBCI at least five business days prior to submitting an application to request an expedited review to cut your review time in half (reduced from 25 business days to 12 business days per review phase). Please note that there is an additional charge for this service, and GBCI's ability to fulfill your request depends on their current review capacity. If your request can be accommodated, GBCI will confirm availability and provide a custom review schedule for your project.

Important Considerations for Split Review:

- You may submit your project for a design review after the design and/or construction documents (CD) are complete. Some projects submit for design review before CDs are done, but others choose to wait until the construction details have been finalized.

- You do NOT have to submit all your design credits during the design review; you may choose to submit only a few design credits during design review but both design and operations credits/prerequisites can be submitted during the operations review.

- There is no additional cost for projects going for split review, but complete certification payment must be made before submission for design review.
- Appendix A identifies the credits or prerequisites that have been classified as either Design or Operations. There are no prerequisites classified for design review, all are classified as operations. For a split review, there are a maximum of 20 credits that can be submitted during design review. The balance of 21 credits and 5 prerequisites are submitted during the operations review.
- Note that all the credits and prerequisites in the Energy Efficiency and Environment category can only be submitted during the operations review.

SUBMITTING AN INQUIRY

Having difficulty fulfilling a rating system prerequisite or credit? Have you thought of an alternative way to interpret a credit or path to fulfill it? You can submit an inquiry.

Credit Interpretation Ruling (CIR): A CIR allows you to obtain technical guidance related to a particular credit or facet of the PEER rating system. Our review team will let you know if your interpretation of a particular credit or prerequisite is consistent with published rating system requirements. When it comes time to submit your application for review, you will need to provide documentation demonstrating fulfillment of the CIR and indicate the approved CIR within your application for certification. You may file an appeal if you are not satisfied with the result of your CIR using the process above. Keep in mind, also, that CIRs are not precedent setting; your project team can only utilize the ruling for the project under which the CIR was submitted.

Contesting a Review Ruling: If resolution of a technical issue related to a review ruling has not been achieved via GBCI's customer support channels and discussion with GBCI reviewers (www.gbci.org/contact), GBCI has put in-place a Review Challenge Policy whereby a project team may challenge the accuracy of a review decision regarding the sufficiency of already submitted materials. Please refer to the GBCI Review Challenge Policy which outlines the process for doing so.

CERTIFICATION

Congratulations, it's time to accept your review results to confirm your PEER certification!

Once you've accepted the final certification report you will no longer be able to submit for supplemental (appeal) reviews, or contest review decisions for specific credits or prerequisites, please double (or triple) check that you have achieved all prerequisites and targeted credits before accepting the final certification.

Certification Levels

While all PEER-certified projects are a cut above the rest, each is assigned one of four levels of certification to acknowledge the degree of achievement. The number of points that your project earns determines the level of PEER certification that you will receive.

- **PEER Certified™:** 40-49 points earned
- **PEER Silver°:** 50-59 points earned
- **PEER Gold°:** 60-79 points earned
- **PEER Platinum°:** 80+ points earned

Promote your project

Once you've earned certification, it's likely that you'll want to tell the world. You should. PEER certification benefits your business's bottom line and underscores your sustainability efforts. It's a cause for celebration!

Our press team is here to support you in your marketing efforts. Contact our press team for assistance. You'll also have the option to order formal certificates of recognition.

CERTIFICATION MAINTENANCE AND RECERTIFICATION

Annual Certification Maintenance

PEER v2 certified projects are required to report their most recent performance data to GBCI annually on the anniversary date of the award letter granting certification. Projects that do not submit data annually will be required to pay registration fees to proceed with recertification. For details refer to PEER Certification Maintenance and Recertification Guidance document.

Recertification

Recertification is required at least once every three years from the date the project achieved initial certification to maintain a current PEER certification. We encourage you to register for recertification as soon as possible upon achieving initial certification as projects will be held to the version of the rating system that is open for registration on the date the project registers for recertification. Failure to submit a recertification application within this timeframe will cause PEER certification to expire. For more details on recertification for projects certified under v1 and v1.1 refer to PEER Certification Maintenance and Recertification Guidance document.

PROJECT INFORMATION: HOW GBCI HANDLES YOUR DATA

PEER-registered and certified projects are, by default, considered non-confidential projects, and thereby included in GBCI's public project directory. A listing in this directory allows the general public and members of the media to look up your project listing and its related details.

Here's a full list of the data and project elements that may be listed in the project directory:

- Project name
- Project ID
- Physical address
- Date of registration
- Date of certification
- Certification level
- Total points earned
- Project scorecard

- Rating system and version
- Owner type
- Owner name
- Owner organization
- Project size (Peak MW)
- Project size (Annual MWh)
- Project type

All non-confidential projects benefit from publicity opportunities. GBCI may utilize your project data to create case studies highlighting your project's features, reference your project on our website or to the media, or create other derivative works.

Information that may be used for articles, project profiles, and other features include:

- Service provider name
- Project team member names, organizations, and titles
- Promotional or other project photographs
- Project strategies for certification
- Quotations from team members

You are free to opt-out of the project directory and publicity opportunities as a confidential project at the time of registration. Confidential project listings in the project directory do NOT include any of the elements above. All confidential projects that earn certification will be prompted once more

to transition to public status (we can't help ourselves; we love sharing good news!). You will need to re-confirm your confidentiality status at that time if you wish to retain it. Projects that retain their "confidential" status after certification, cannot be marketed or represented as PEER certified to the general public. Please carefully review of the GBCI Trademark Policy and Branding Guidelines for more information.

FEES

So, how much will it cost to certify your project and keep it certified? PEER Certification provides an exceptional value for your money. View the current pricing, with explanations below.

- **Registration fee:** There is a flat registration fee, calculated on a per-project basis, that you'll pay up front at the time of registration for initial certification. Rates are based on the fee schedule published at the time of registration. Registration fees must be paid within 30 calendar days, otherwise the registration may be cancelled.
- **Certification fee:** The certification fee is charged on a per-project basis and is based on the project type. Certification fees are due within 30 calendar days from when you submit your application for review. After all that work you did to submit your documentation, don't forget to send your payment! Remember, GBCI will not begin your review until payment in full has been received and cleared our system (thank you!). Also, please note that certification fees are based on the fees published at the time the project is submitted for review and cover both the preliminary and final reviews.
- **Other fees:** Other fees related to precertification, recertification, expedited reviews, appeals, and other optional aspects of the PEER certification process may apply, should you pursue these avenues.
- **Payment terms:** Invoices must be paid within 30 calendar days. A one-time extension of an additional 30 calendar days is available – please contact GBCI. If invoices are not paid within the required timeframe, they will be cancelled, and in subsequent requests for services, the invoice amount may change according to the prevailing fee schedule. Fees View the current pricing

REVOCATION OF PEER CERTIFICATION

In rare situations, PEER certification may be revoked. We've created the GBCI Certification Challenge Policy to ensure that all PEER project submittals and subsequent reviews by GBCI team members are done so with integrity, accuracy, and truthfulness. A certification challenge may be initiated by GBCI or by any third party within 18 months of a project's certification. The certification challenge may include additional review of project documentation, the review of supplemental information, and/or a site visit. In line with the policy, you'll need to retain all project documentation related to your certification, and the achievement of prerequisites and credits, for two years after receiving certification, to ensure that this information is available in case of a challenge.

RESOURCES

Rating System Document
PEER Education
Reference Guide

APPENDIX A

Design and Operations credits for Split Review Process:

D = Design Stage, O = Operations stage (requires data from at least one year of operations)

D	O				Campus	Utility	Transit
4	**4**		**Reliability and Resiliency**		**30**	**30**	**30**
	O	Prereq	Reliability Performance Monitoring		Required	Required	Required
	O	Credit	Reliability Performance Assessment		6	6	6
	O	Credit	Momentary Interruption Tracking		1	1	1
D		Credit	Damage and Exposure Prevention		6	6	6
D		Credit	Distribution Redundancy and Auto Restoration		2	2	2
D		Credit	Alternate Sources of Supply		5	5	5
D		Credit	Power Surety and Resiliency		5	5	5
	O	Credit	Power Quality Capabilities		5	5	5
1	**6**		**Energy Efficiency and Environment**		**27**	**25**	**30**
	O	Prereq	Environmental Performance Disclosure		Required	Required	Required
	O	Prereq	System Energy Efficiency Coefficient Disclosure		Required	Required	Required
	O	Credit	Environmental Performance Improvement		10	10	10
	O	Credit	System Energy Efficiency Coefficient Improvement		3	3	3
	O	Credit	Green Power and Carbon Offset		4	4	4
D		Credit	Distributed Energy Resources		5	6	8
	O	Credit	Environmental Impacts Assessment, Disclosure and Management		5	2	5
7	**2**		**Operations, Management and Safety**		**23**	**21**	**23**
	O	Prereq	Triple Bottom Line Analysis		Required	Required	Required
D		Credit	Risk Assessment and Mitigation		4	4	4
D		Credit	Emergency Response Planning		3	3	3
D		Credit	Safety Review Process		2	2	2
	O	Credit	Operational Processes		4	4	4
D		Credit	Advanced Metering Infrastructure		3	3	3
D		Credit	Master Controller		3	3	3
D		Credit	Communication Network and Information Processing		2	2	2
D		Credit	Energy Management System		2		2

D	O			Campus	Utility	Transit
6	6	**Grid Services**		**20**	**24**	**17**
	O	Prereq	Consumer and Load Survey	Required	Required	Required
	O	Credit	Customer Engagement		3	
	O	Credit	Load Duration Curve Optimization	4	3	4
D		Credit	Data Privacy and Cybersecurity	1	2	1
	O	Credit	Access to Energy Usage Data	4	4	
	O	Credit	Supply Choice	2	1	2
D		Credit	Demand-side Management	3	3	5
D		Credit	Demand Response	2	2	2
D		Credit	Streamlined Interconnection and Net Metering Policies		4	
D		Credit	Other Tools and Financial Incentives	1	1	
	O	Credit	Aggregation	1	1	1
D		Credit	Advanced External Interface	2		2
4	2	**Innovation and Exemplary Performance**		**6**	**6**	**6**
D		Credit	Innovation: Specific Innovation	1	1	1
	O	Credit	Innovation: Specific Innovation	1	1	1
D		Credit	Innovation: Education	1	1	1
D		Credit	Exemplary Performance: Specific Credit	1	1	1
D		Credit	Exemplary Performance: Specific Credit	1	1	1
	O	Credit	Exemplary Performance: Specific Credit	1	1	1
2	2	**Regional Priority**		**4**	**4**	**4**
D		Credit	Regional Priority: Specific Credit	1	1	1
D		Credit	Regional Priority: Specific Credit	1	1	1
	O	Credit	Regional Priority: Specific Credit	1	1	1
	O	Credit	Regional Priority: Specific Credit	1	1	1
24	22	**TOTALS**		**110**	**110**	**110**

D = Design Stage, O = Operations (requires data from at least one year of operations)

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