

Building Performance with ENERGY STAR® *EPA's Pilot*

CEE

Commercial Whole Building Performance Committee
January 26, 2011

Overview



- Building Performance with ENERGY STAR (BPwES) program model
- Concept in practice: partner pilot activities
- EPA's support of the program model
- BPwES elements highlighted for breakout discussion
 - Strategic energy management
 - Performance monitoring

ENERGY STAR in the Commercial Buildings Sector



- National partnership
 - Building owners and operators
 - Service and product providers
 - Energy efficiency program sponsors (e.g., CEE members)
- Recognition for superior energy performance
 - Label for individual buildings
 - Leaders for portfolio of buildings
 - Partner of the Year for organizational performance
- Key program initiatives
 - Automated benchmarking system
 - National Building Competition
 - Building Performance with ENERGY STAR

Best Practices in Whole-Building Programs



Program Elements	MidAmerican Energy Analysis Program	National Grid Whole Building Assessment	PG&E: More than a Million	Xcel: Commercial Real Estate Efficiency	Focus on Energy: Business Program	Northwest Energy Efficiency Alliance: BetterBricks
Targeted Marketing/ Recruiting				√	√	√
Benchmarking	√	√	√	√	√	√
Action Plan Development	√	√				√
Whole-Building Performance Assessment	√	√	√	√	√	√
Whole-Building Upgrades	√			√	√	
Performance Monitoring and Verification		√	√	√	√	√

What is Building Performance with ENERGY STAR (BPwES)?



- A program model designed to help program sponsors achieve increased energy savings by strategically pursuing **whole building** energy improvements with commercial sector customers
 - Similar to “Home Performance with ENERGY STAR”
 - Uses best practices from EEPS programs & ENERGY STAR
- BPwES can help program sponsors:
 - Meet aggressive savings goals
 - Capture deep energy savings in existing commercial buildings
 - Enhance customer relationships
 - Build local solutions for delivering whole building energy improvement services

BPwES Pilot: Required Program Elements



Use of the BPwES name, logo, and tools will be licensed to EEPS for programs with the following elements:

- **Target Marketing/Recruiting:** Focus on one or more specific commercial building markets (e.g., office, retail, K-12 schools)
- **Benchmarking:** Use EPA's Portfolio Manager tool to prioritize buildings for assessment and upgrade
- **Strategic Energy Management/Action Plan Development:** Help customers to develop strategic action plans that engage high-level decision makers
- **Whole-Building Performance Assessment:** Identify opportunities for improvements across all building systems
- **Whole-Building Upgrades:** Structure incentives to encourage customers to undertake whole-building improvements
- **Performance Monitoring and Verification:** Validate program impacts, support re-benchmarking, and assess customer satisfaction

Elements Address Market Barriers



Barrier	BPwES Strategy
Lack of understanding of building performance; lack of strategic planning	Use benchmarking to gain management attention and prioritize properties for further assessment. Reduces potential for “stranded costs” by engaging senior management in committing to take action.
Lack of up-front capital and/or big-picture vision to implement comprehensive upgrades	Help senior management understand the role of energy efficiency as a revenue stream to fund continuous energy improvement.
Trade ally network geared primarily toward equipment sales	Educate and build a trade ally network to provide whole building services.

The aim of BPwES



- Traditional programs each have their role
 - Prescriptive incentives - simple equipment replacements
 - Custom incentives - more complex and capital-intensive
 - Retro-commissioning - O&M savings
- BPwES defines an *integrated* approach to delivery that:
 - Tailors value messages for targeted business sector(s)
 - Helps customers plan strategically for improvements over time
 - Combines opportunities for operational improvement, system optimization, and capital upgrades
 - Provides solutions that span the range of program offerings

Enable customers to leverage the **right resources**
at the **right time** to maximize savings

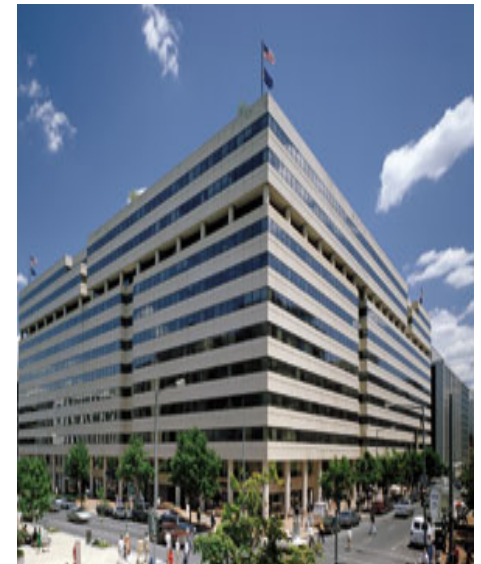
Benefits of an Integrated Approach: International Square



Lighting retrofit
New VFD's

As a result of the reduced heat load,
two 3,800 ton chillers were replaced with
two 3,400 ton chillers

Annual energy savings of 3 million kWh



Owned and Managed
by Blackstone

Taking BPwES to the Market



The BPwES program model allows for flexibility in implementation

- **“Umbrella” approach** – Built of existing incentive offerings; BPwES bundles offerings and provides facilitated access
- **“Stand-alone” approach** - BPwES offered as a new initiative with incentives designed around targeted sector(s) specifically designed to promote whole building upgrades

Customer Targeting in Pilot



- Commercial buildings, including the following sectors
 - Commercial and Corporate Real Estate
 - Hospitality
 - Retail
 - Supermarkets
 - Schools
 - Healthcare
- Mid- to large-sized buildings
- Customers with large portfolios

BPwES Pilot Participants

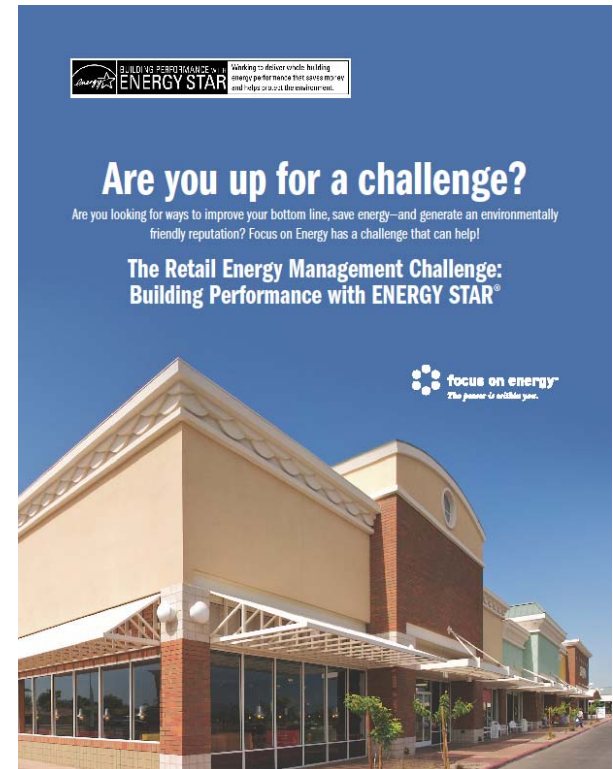


Pilot Program Activities



- BPwES pilot program soft launch
 - May 5, 2010 – Press Release
- Conference calls with pilot program participants
 - June 2010 – Kickoff Call, Program Plan Discussion
 - July 2010 – Target Marketing, Trade Ally Involvement
 - September 2010 – Evaluation Discussion
- Participant progress
 - 2 sponsors have launched new/revised programs
 - 4 sponsors extending existing programs
 - 2 sponsors considering new program designs

- Targeted sector
 - Retail
- Status
 - Launched the “Retail Energy Management Challenge: Building Performance with ENERGY STAR” in Summer 2010
 - Recruited 4 participants, representing 100+ stores and almost 10 MSF (EPA assisted with match-making)
 - Benchmarked all buildings, identified 2 for each customer for assessment
 - Held energy management discussions
 - Presented on targeted marketing during July group call
 - Presented with EPA at AESP



- Targeted sectors
 - Retail Chains (NJ-based: A&P, Shop Rite, Toys ‘R’ Us, Verizon)
 - Health Care / Hospital (multi-location institutions)
- Status
 - Integrating BPwES with existing Pay for Performance program
 - Goal is 15% whole-building savings, verified via Portfolio Manager
 - Targeting 7–10 customers, comprising 40–50 buildings
 - Presented on trade ally integration during July group call
 - Presented with EPA at AESP
 - BPwES press release – January 2011

PAY FOR PERFORMANCE

GET PAID TO MAKE YOUR FACILITIES ENERGY-EFFICIENT

The project you thought was out of budgetary reach may be well within your company's means. Together with Pay for Performance, you can save now...and save later.

HOW IT WORKS

For new construction or existing buildings, Pay for Performance relies on a network of approved partners who provide technical services under direct contract to you. Acting as your energy expert, your partner will develop an energy reduction plan for each project with a whole-building technical component of a traditional energy audit, a financial plan for funding the energy-efficient measures and a construction schedule for installation. And the more energy your project saves...the more incentives your company earns.



EXISTING BUILDING

- **Incentive #1:** Paid upon submittal of a complete energy reduction plan prepared by an approved partner. Contingent on moving forward, incentives will be between \$5,000 and \$50,000 based on \$10 per square foot.
- **Incentive #2:** Paid upon installation of all recommended measures. Incentives are based on the projected level of electricity and natural gas savings and are paid at \$11 to \$13 per kWh saved and \$110 to \$145 per therm saved.
- **Incentive #3:** Paid upon completion of a post-construction benchmarking report verifying projected energy savings. Incentives are based on actual electricity and natural gas savings and are paid at \$0.7 to \$2.00 per kWh saved and \$1.70 to \$1.05 per therm saved.

NEW CONSTRUCTION

- **Incentive #1:** Paid upon submittal of a complete draft energy reduction plan prepared by an approved partner. Based on the project's design development drawings, and contingent on moving forward, incentives will be \$10 per square foot up to \$25,000.
- **Incentive #2:** Paid upon submittal of a complete proposed energy reduction plan. Based on the project's final construction documents, and contingent on moving forward, incentives will be \$50 per square foot.
- **Incentive #3:** Paid upon submittal of a complete as-built energy reduction plan verifying that the as-built building met or exceeded projected energy cost savings. Incentives will be \$1.50 to \$1.00 per square foot.

Getting Started

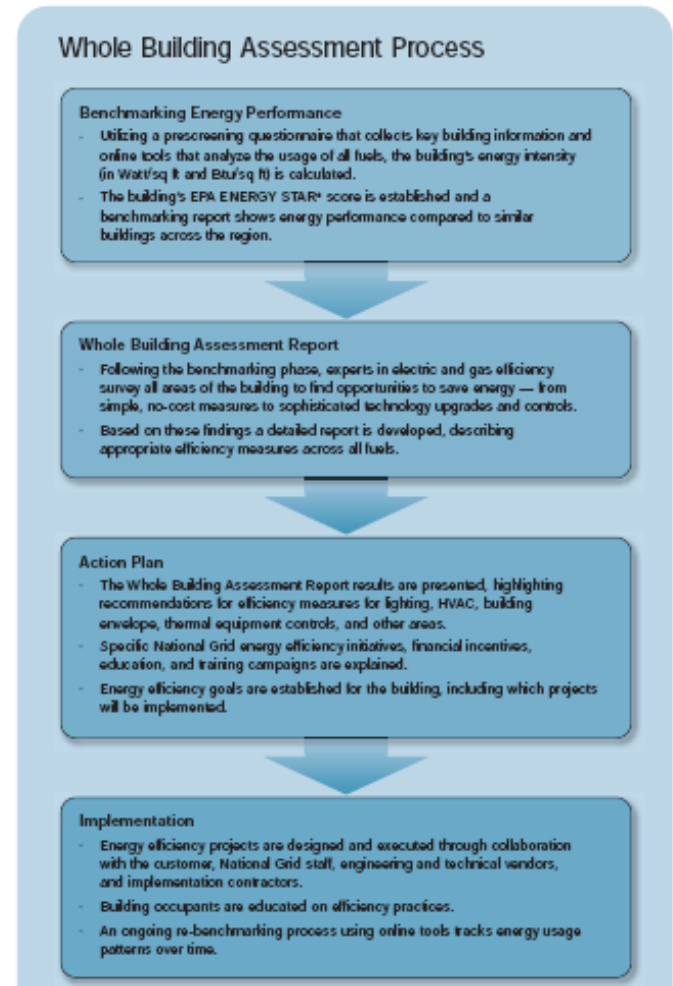
To learn more about Pay for Performance, or to download participation forms, visit NJCleanEnergy.com/P4P. You can also contact a program representative with questions at info@njcleanenergy.com or call 866-50-ENERGY.

Visit NJCleanEnergy.com/P4P for a B166-RES001E.



By SmartStart Building P, a registered trademark. One of the trademarks without permission of the U.S. House of Public. (Source is published.)

- Targeted sector(s)
 - Managed office properties
 - Supermarkets
 - Municipal buildings
- Status
 - Continuing existing Whole Building Assessment program, which is well aligned with BPwES
 - Interest in Action Planning portion of the program





SOUTHERN CALIFORNIA
EDISON[®]

An EDISON INTERNATIONAL[®] Company



A  Sempra Energy utility[®]



- Targeted sector
 - TBD
 - Status
 - Considering integration with Continuous Energy Improvement (CEI) Program, which...
 - Supports customers with a strategic approach to energy management
 - Drives projects to existing rebate programs
 - Promotes corporate branding and recognition
- (including ENERGY STAR, DOE Save Energy Now, SEP, ISO 50001, LEED)

Continuous Energy Improvement

A comprehensive approach to energy management


For companies ready to take their facilities and corporate energy management to the next level, Southern California Edison (SCE) and Southern California Gas Company (SoCalGas[®]) are teaming up to offer the Continuous Energy Improvement Program (CEI), designed to help qualifying customers implement strategic, ongoing energy-management practices.

What does CEI offer?

- Consulting services aimed at helping your business drive continual improvements in energy performance. Energy advisors will help identify and implement energy projects and practices that control and reduce energy waste.
- An energy advisor to coach you through:
 - a comprehensive organizational and technical assessment,
 - strategic energy planning,
 - action plan implementation,
 - evaluation of measured savings, and
 - modification of plans, as needed, to provide continuous improvement.
- Identification of energy management opportunities throughout your business, including conservation, operations and maintenance,

time-of-use management, energy efficiency, demand response, and self-generation. The program leverages utility incentive programs.

- Help in setting energy targets, developing policies and strategic plans, defining metrics, and establishing employee energy awareness and training activities — all of which are critical to driving sustained, continuous improvement.
- Help in pursuing branding and certification programs, such as the emerging ISO 50001 Management System Standard in Energy, Superior Energy Performance, ENERGY STAR[®] and LEED for Existing Buildings.
- The program cycle will last approximately two years, during which time the energy advisor and technical resources will be available to support you at regular intervals.



The CEI Process
CEI, offered at no charge, helps drive energy waste out of your operations by implementing a continuous improvement cycle.

EPA's Support of BPwES



Sponsors Guide to ENERGY STAR for Commercial Programs

U.S. ENVIRONMENTAL PROTECTION AGENCY

[Home](#) > [Partner Resources](#) > [Utility & EEPS](#) > [C&I Program Sponsors](#) > [Guide to ENERGY STAR for Commercial Programs](#)

Sponsors Guide to ENERGY STAR for Commercial Programs

Leverage ENERGY STAR tools and resources for [buildings](#) and [plants](#) to promote whole-building energy performance improvements within your program portfolio.

Building on the practices of leading energy efficiency program sponsors and the EPA ENERGY STAR partnership, this guide describes the core program elements of a successful building performance program.

See how ENERGY STAR can help you!



Target Marketing / Recruiting

Benchmarking

Strategic Energy Management / Customer Action Plans

Whole-building Performance Assessment

Whole-building Upgrades

Performance Monitoring and Verification

ENERGY STAR Web site pulls together resources covering the key components of BPwES

Additional assistance in program development can be provided by EPA and contractor staff

Additional BPwES Resources



- Program Framework
- BPwES Logos & Logo Use Guidelines
- Performance Assessment Guidelines
- Action Planning Guidelines (draft near completion)
- Sample filing language (under development)



Performance Assessment Guidelines



Pilot Program Guidelines for Conducting Performance Assessments for Building Performance with ENERGY STAR®



Introduction

This document provides top level guidance for conducting whole-building performance assessments that meet the intent of Building Performance with ENERGY STAR (BPwES) program requirements. The elements identified herein can be integrated in program materials and traditional audit approaches, such as walk-through audits, investment-grade audits or retro-commissioning investigations. The checklist is not a "how to" guide for performing one specific type of assessment¹. It is intended to identify key elements that should be considered in performance assessments, regardless of detail level. The early experience of program sponsors implementing whole-building performance programs indicates that in-depth, investment grade audits are not always necessary to support more comprehensive action. In many cases a combination of benchmarking and a scaled-down assessment can be sufficient to identify opportunities, support action plan development, and motivate building operators to take action.

Performance Assessment Key Considerations

The goal of BPwES is to take an integrated, systems-based approach to whole-building performance assessment, in order to identify the highest level of cost-effective savings across all building systems. In order to meet this goal, assessments should address the following key considerations:

- Assess whole-building energy performance. EPA's [Portfolio Manager](#) benchmarking tool ([energystar.gov/benchmark](#)) is used to evaluate the actual performance of a facility and requires energy consumption from all fuels in order to compare energy performance to peers using the 1-100 rating system. Assessments that include only a single fuel are insufficient to fully understand building performance and identify comprehensive savings opportunities.
- Examine system-level energy intensities as a second level diagnostic. A deeper understanding of building performance can be gained by considering the energy consumption of various building systems (e.g. lighting, plug load, heating, cooling, and ventilation). By understanding the relative impact of different end uses, a performance assessment can identify the measures that will result in the greatest energy savings. System-level energy intensities can be obtained through energy modeling, sub-metering, or engineering estimates.

¹ Additional information on energy audit procedures is available from the American Society for Heating, Refrigeration, and Air Conditioning Engineers (ASHRAE) or the Association of Energy Engineers (AEE).

DRAFT – March 2010

DRAFT – March 2010

capital upgrades. Traditional audits often miss opportunities through operations and maintenance change. The experience of ENERGY STAR performance is often the result of operational changes made through cost-effective O&M programs for future capital investments.

Maximize energy savings and reduce energy efficiency upgrades. It starts with energy audits, followed by lighting upgrades, to air distribution systems. Lastly, heating and cooling loads for the building has been reduced. Coordination between building systems to sequencing can reduce cooling loads by up to 10% for new systems.

Load efficiency. The experience of ENERGY STAR performance is often correlated with load conditions. Proper sizing and part-load performance of major building systems. These concepts apply to heating and cooling systems. It is important to optimize equipment and to optimize efficiency by using variable speed drives. The same concepts apply to lighting. Efficiency can be optimized by designing lighting sensors for part load control.

Energy performance in terms that building operators and facility managers in other projects forward. It is important to communicate using financial metrics that are meaningful to building owners. Metrics such as rate of return, impact on asset value for building owners, equivalent increase in energy efficiency, and [financial evaluation tools](#).

Information. In order to understand whole-building performance, the following information:

Energy consumption and costs are key metrics. Assessment reports should also display energy intensity. Eligible building types² can receive a weather-normalized energy efficiency score. Buildings that do not receive a weather-normalized energy efficiency score are not eligible for ENERGY STAR.

Assessment report should indicate the level of energy efficiency of all identified efficiency measures.

[Energy Efficiency](#).

Assessment report should include a copy of the assessment report. Recommendations and key criteria and elements of a BPwES assessment report. Recommendations and key criteria and elements of a BPwES assessment report should include a copy of the assessment report. Recommendations and key criteria and elements of a BPwES assessment report should include a copy of the assessment report.

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Summary table presenting all identified energy savings.

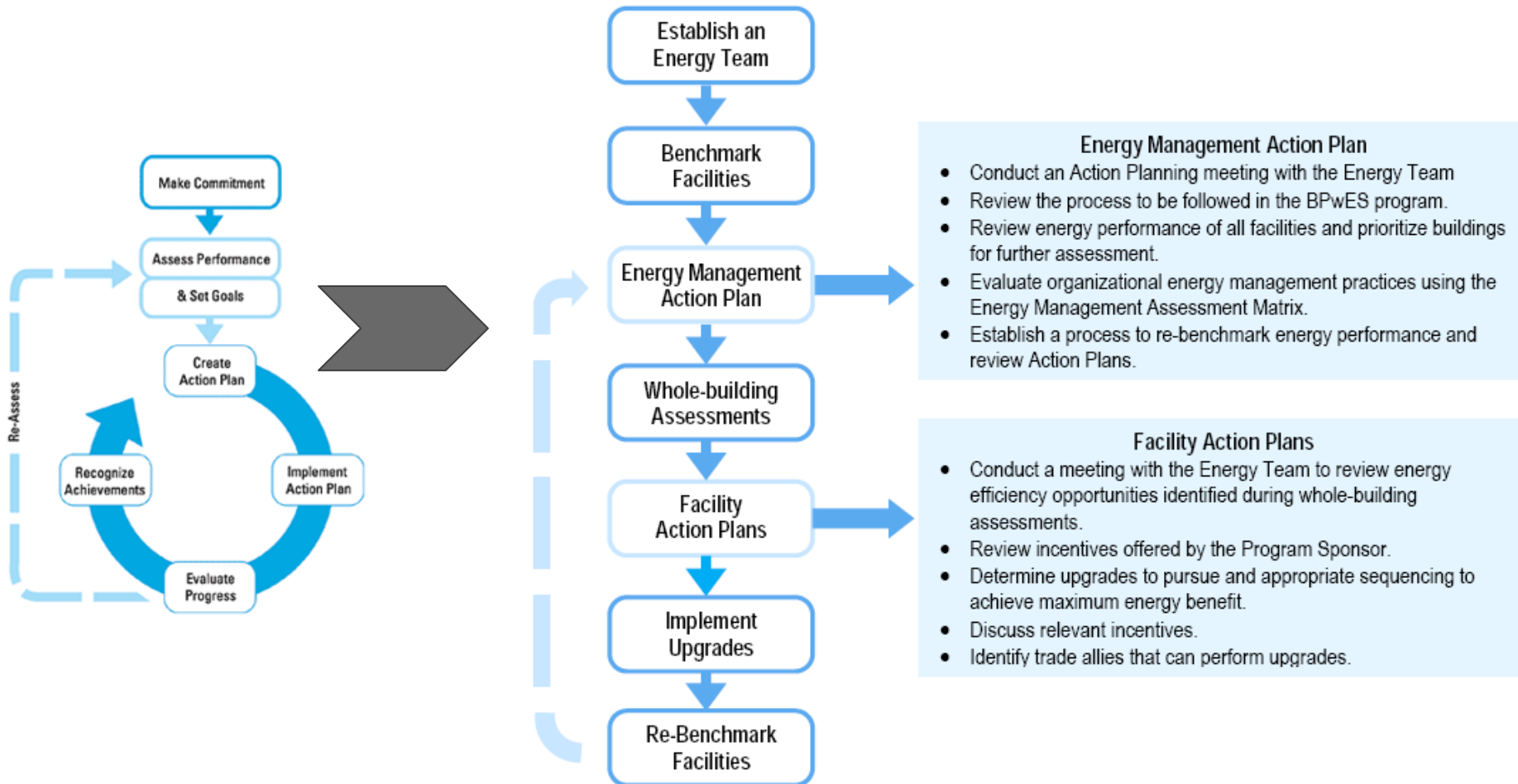
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Strategic Energy Management: Guidelines to Program Action



Action Planning Guidelines



- Action Planning Guidelines
- Energy Management Action Plan Template
- Facility Action Plan Template


BUILDING PERFORMANCE WITH ENERGY STAR

Pilot Program Guidelines for Action Plan Development for Building Performance with ENERGY STAR®

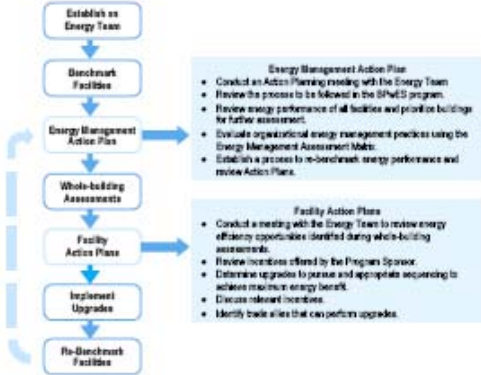
The Action Planning requirement of the Building Performance with ENERGY STAR (BPwES) Program helps:

- 1) Secure financial and human capital -- engaging senior management, and those responsible for financial planning, building management, and maintenance, in making energy efficiency an organizational priority
- 2) Ensure progress and accountability -- detailing near- and long-term steps that need to be taken, by whom, and during what time frame, in order to improve energy performance
- 3) Document facility-level commitments -- ensuring that technical and financial agreements between the Program Sponsor and Program Participant are clearly understood when moving projects forward.

Using a portfolio approach to energy management, action planning occurs in two phases:

- **Energy Management Action Planning** is used to review overall energy management practices and performance, and to identify facilities that will benefit most from in-depth assessment.
- **Facility Action Planning** is used to develop plans for implementing recommended improvements at the building level.

The diagram below illustrates the recommended steps in a BPwES program, and shows how action planning is integrated into the program process.



```
graph TD; A[Establish an Energy Team] --> B[Benchmark Facilities]; B --> C[Energy Management Action Plan]; C --> D[Whole-building Assessments]; D --> E[Facility Action Plans]; E --> F[Implement Upgrades]; F --> G[Re-Benchmark Facilities];
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Action Planning Guidelines

Aligning ENERGY STAR Tools with BPwES Program Elements



I. BUILDING PERFORMANCE WITH ENERGY STAR REQUIRED PROGRAM ACTIONS AND RELATED TOOLS TO ASSIST

The table below lists the action items included in the [PROGRAM SPONSOR] Building Performance with ENERGY STAR program, along with responsible parties, target completion date, and relevant ENERGY STAR and other program resources to assist with each activity.

Energy Management Action Plan maps program steps to ENERGY STAR tools

No.	Action	Responsible Parties	Target Completion Date	ENERGY STAR & Program Resources
1	Establish an Energy Team			Teaming Up to Save Energy
2	Benchmark Energy Performance for Portfolio of Facilities			Portfolio Manager
3	Conduct a Strategic Planning Meeting <ul style="list-style-type: none"> Review Portfolio Performance and Identify Targets for Assessment Evaluate Energy Management Practices 			Energy Management Assessment Matrix
4	Develop an Energy Management Action Plan			Guidelines for Energy Management
5	Conduct Whole-building Performance Assessments on Targeted Facilities			Building Upgrade Manual
6	Develop Facility Action Plans based on Assessment Results			Guidelines for Energy Management
7	Attend Status Meetings to Monitor implementation of Action Plan			--
8	Re-Benchmark to Evaluate Progress			Portfolio Manager
9	Conduct Additional Performance Assessments (as appropriate)			Building Upgrade Manual

Strategic Energy Management: Energy Management Assessment Matrix



Energy Management Assessment Matrix

ENERGY STAR® Energy Management Assessment Matrix				
	Little or no evidence	Some elements	Fully implemented	Next Steps
Make Commitment to Continuous Improvement				
Energy Director	Unemployed or organizational absence. No oversight management.	Central or organizational absence of assessment.	Employment central or organizational leader with senior management support.	
Energy Team	No cross-departmental activity.	Informal organization.	Active cross-functional team working on energy projects.	
Energy Policy	No formal policy.	Referenced in environmental or other policies.	Formal standalone EE policy endorsed by senior management.	
Assess Performance and Opportunities				
Gather and Track Data	Little metering/tracking.	Local or partial metering/tracking/reporting.	All facilities report for central metering/determinations.	
Normalize	Not addressed.	Some unit conversions or weather adjustments.	All necessary adjustments for organizational analysis.	
Establish baselines	No baselines.	Various facility-established.	Standardized organizational data year-end metrics established.	
Benchmark	Not addressed or only same-site, regional comparisons.	Some internal comparisons among company sites.	Industry external & external comparisons & analysis.	
Analyze	Not addressed.	Some attempt to identify and correct issues.	Thorough identification trends, needs, values & issues.	
Technical assessments and audits	Not conducted.	Internal facility reviews.	Reviews by multi-functional team of professionals.	
Set Performance Goals				
Determine scope	No specific goals.	Short-term facility goals or overall corporate goals.	Short & long-term facility and corporate goals.	
Estimate potential for improvement	No process in place.	Specific projects based on limited metrics structures.	Facility & organization defined based on metrics.	
Establish goals	Not addressed.	Lazily defined or sporadically updated.	Specific & quantitative of metrics, organizational needs.	
Create Action Plan				
Define technical steps and targets	Not addressed.	Facility-level considerations on operability issues.	Detailed multi-year targets with timelines in place across.	
Determine roles and resources	Not addressed or done on ad hoc basis.	Informal interested person completes for funding.	Interdepartmental roles defined & funding identified.	
Implement ACTION Plan				
Create a communication plan	Not addressed.	Tools targeted for some people used occasionally.	All stakeholders are addressed on regular basis.	
Raise awareness	No provision of energy efficiency.	Periodic references to energy initiatives.	All levels of organization support energy goals.	
Build capacity	Infrequent training only.	Some training for key individuals.	Specialized/professional in technology & best practices.	
Motivate	No or occasional contact with energy users and staff.	Thanks for non-performance or periodic reminders.	Incentives, financial & performance incentives.	
Track and monitor	No system for monitoring progress.	Annual reviews by facilities.	Regular reviews & updates of performance system.	
Evaluate Progress				
Measure results	No reviews.	Technical comparisons.	Compare target & metrics with actual data, adjustments.	
Review action plan	No reviews.	Informal check on progress.	Review plan based on results, feedback & business factors.	
Recognize Achievements				
Provide internal recognition	Not addressed.	Identify successful projects.	Acknowledge contributions of individuals, teams, facilities.	
Get external recognition	Not sought.	Unilateral or sporadic acknowledgment.	Designated/officially validating achievement.	

ENERGY STAR Guidelines For Energy Management



Strategic Energy Management: Pilot Participant Approaches

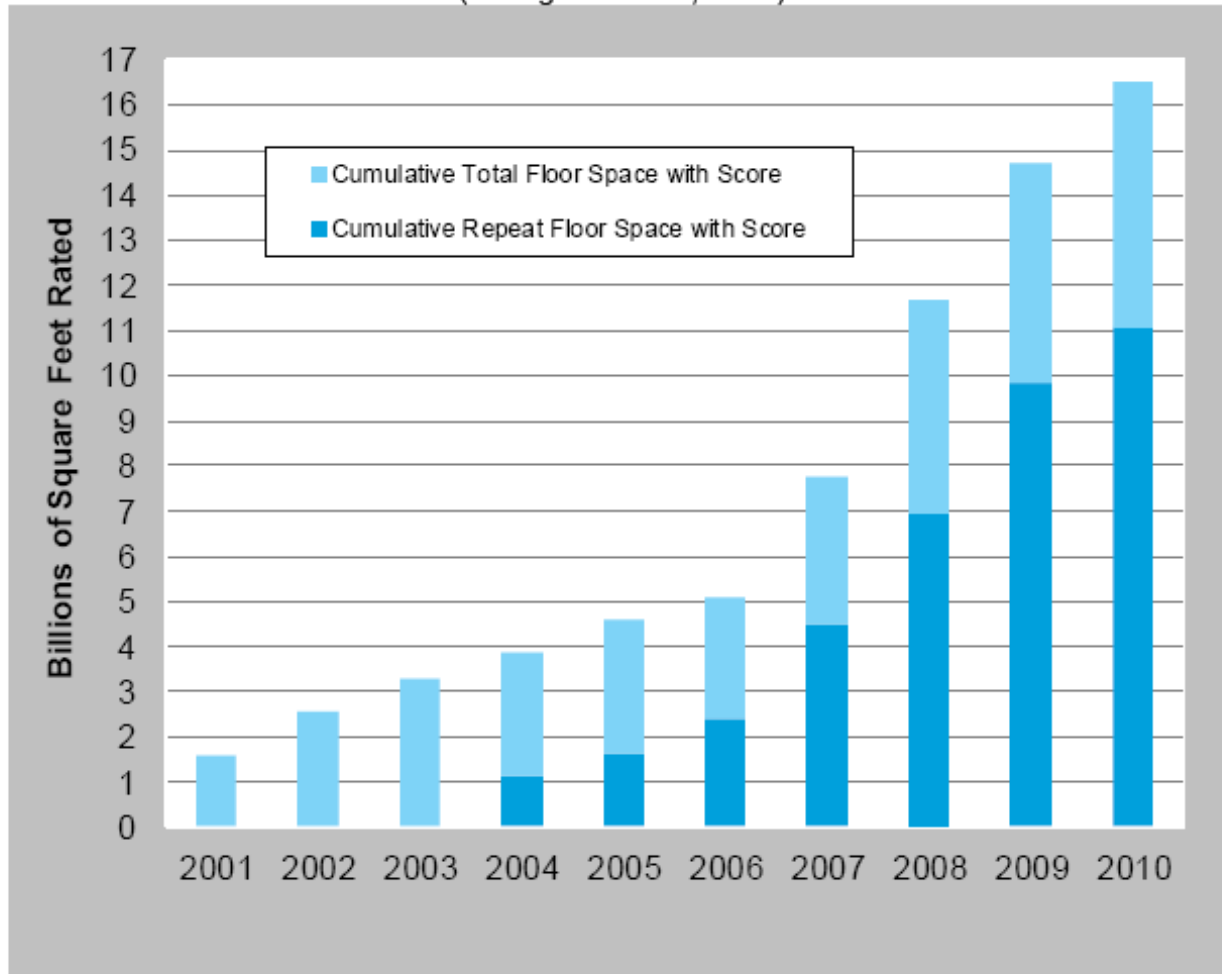


Focus on Energy	Conducts "Practical Energy Management" trainings, based on the Guidelines for Energy Management.
New Jersey CEP	Uses the ENERGY STAR Energy Management Assessment Matrix for a portfolio-level action plan. Completes Energy Reduction Plans for buildings by a vendor partner on behalf of the building owner.
National Grid	Conducts an Action Planning meeting to discuss short- and long-term approaches to energy management.
SCE	Creates a Strategic Energy Management Plan, Energy Goals, and Energy Policy as part of the CEI program.
PG&E (Original Plan)	Meets with the customer to review energy management practices, identify relevant ENERGY STAR resources, review benchmarking results, and prioritize buildings for more in-depth energy assessments.
ComEd (Original Plan)	Facilitates the use of Envinta's "One 2 Five" tool and the ENERGY STAR Energy Management Assessment Matrix to develop an action plan.
MidAmerican	TBD

Performance Monitoring: Re-benchmark to Verify Performance



Buildings Receiving an ENERGY STAR Score
(through June 30, 2010)



Performance Monitoring: Pilot Participant Approaches



Focus on Energy	Customers are required to keep Portfolio Manager accounts updated. Uses Portfolio Manager to track savings impacts; SEPs collected to support evaluation efforts.
New Jersey CEP	Uses Portfolio Manager as the primary tool for demonstrating and verifying savings. Uses a building-specific metering plan as part of P4P, with IPMVP option 4 (calibrated simulation) preferred.
National Grid	Customers agree to benchmark energy performance for a period of one year. Uses re-benchmarking as an opportunity to re-engage with customers and encourage the implementation of new projects.
SCE	Uses Monthly and Annual Progress Reports that track savings from implemented projects.
PG&E (Original Plan)	Uses Automated Benchmarking Service for continuous benchmarking. Generates a benchmarking report that shows improvement, which can be easily replicated by participants.
ComEd (Original Plan)	Use Portfolio Manager to verify post-installation savings.
MidAmerican	TBD

Evaluation Challenges for Whole-building programs



- Measuring interactive effects between measures
- Capturing O&M or behavioral savings
- Persistence of savings from O&M and behavioral change
- Recommended measures often implemented in stages, not as a package
- Evaluations generally focus on a specific time period of implementation
- Net program effect
- Regulatory acceptance of evaluation approach

Program Tracking Metrics



- Number of participants
- Number of buildings and floor space benchmarked
- Number of whole-building assessments
- Whole-building energy consumption pre- and post-retrofit
- Energy performance score pre- and post-retrofit
- Total energy and cost savings
- Implementation rate for measures
- Number of measures receiving program incentives

Next Steps



- Respond to need for further materials
- Continue experience exchange
- Support individual pilot participants
- Expansion of program

Contact Information



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