



BEPS Working Group Wrap Up – Key Takeaways October 7, 2019

Session # 1 – Financing & Incentives

Topic - Financing

- Much of the market is unaware of financing and incentive options. More education needed.
- Incentives given at the end of the project are a barrier to participation. Bridge financing needed.

Topic – Rebates & Incentives

- Staff capacity for researching and obtaining incentives/rebates can be a barrier to certain sectors (i.e. affordable housing)
- A one-stop-shop for all incentives and rebates might be helpful – sounds like the Hub could offer this
- There is significant interest in design incentives or education on energy efficiency for parties involved in the early design stages of a project (i.e. architects)
- Praise of DCSEU's non-monetary value
- Help institutions make decisions and consider new option, identify areas where savings can be found, provide outside clout for staff making pitches to managers
- Affordable housing, Assisted living facilities, and sectors with split incentives require additional support
- Talk about new trend of tenants caring more about the efficiency of their building

Topic – Non-financial Incentives

- Pre-permitting communications to set up process and contacts
- Free energy auditing to get people started would be a great incentive

Topic – Operations & Maintenance

- Examine other regional incentive providers for training ideas (NYSERDA, Empower MD, etc.)
- Need for ongoing training – not a one-and-done (addressing turnover, reassignments, aging workforce, retro-commissioning training)
- Staffing capacity is an issue – adding energy-focused duties on top of existing duties is too much. Explore NYSERDA program that funds energy managers 75% in first year.
- Explore ESCOs in more detail for contract structuring or risk assessment assistance to remove barriers

Topic – Onsite Renewables

- Bundling solar or green roof installation into other planned energy efficiency projects is a key communication point. Installers may be an ally in helping them to encourage projects to think holistically.
- Potential to use SREC value to help finance efficiency measures at time of installation, especially if installer is involved in all aspects.
- Education needed to encourage long-term thinking for building-owners on renewables and efficiency – need to look beyond one five-year BEPS compliance period and invest further to avoid next cycle and beyond

Session # 2 – Program Implementation and Structure

Topic – Equivalent Metrics

- Generally, people preferred the first scenario of Weather Normalized Source EUI
- Concern about fairness to buildings who do get energy star scores
- Concern about incentivizing Natural Gas
- Local v. national metrics
- Whether or not RECs should affect metrics

Topic – Property Types

- Most liked Scenario #3 with multiple use breakdowns, but concerned that there is enough data to be able to breakdown properly
- Need to have some sort of robust grouping to spark competition amongst similar property types.
- Property type breakdown should be more granular than scenario #1
- DOEE should run analysis to determine how we should classify building types and present actual numbers with different breakdowns of property types
- Start with Portfolio Manager types for simplicity, but decide where to get more/less granular if/when statistical analysis shows significant differences

Topic – Data Verification

- Use Energy Star data verification checklist
- Who? No consensus on whether in-house or third party should be allowed.
- Lots of focus on how to enforce; mostly centered around need for DOEE to audit the verifiers and crack down on errors.
- DOEE accreditation could be valuable work force development tool, but shouldn't be required in addition to other qualified credentials as likely to receive pushback from market. May be better for DOEE to support more broadly applicable accreditation (CEM?) instead of own credential.
- Best to require teams to submit the verification checklist to DOEE at the same time as

benchmarking data.

Topic – Enforcement

- Most preferred fines based on square footage
- Most preferred distance from standard in EUI terms to determine fine
- Tenant issues when it comes to behavior

Session # 3 – Technical Assistance and Training

Topic – Auditing and Analysis

- Analysis should help the owners look past the initial 5 years. Long term strategies.
- Interest in a 3rd party vetted vendor list by DOEE
- Guidance for building owner on auditing and managing a vendor through the process
- Need Tenant/Occupant Engagement guidance and training
- Training focused on operations and maintenance

Topic – Training

- Cost was a frequent topic of discussion – delicate balance between free and charging small fee
- Need clearinghouse for list of available trainings (Hub)
- Two tracks; what is required (DOEE) and how to comply (others).
- Topics:
 - Energy Star Portfolio Manager
 - Benchmarking
 - Legislations and rules
 - Incentives/Financing
 - Building operators
 - Tenant and resident engagement
 - Green Leasing
 - Retro-commissioning/retuning
- Tie topics to items on the prescriptive pathway

Topic – Informational/Networking

- People want a human-element, either in terms of a hotline or email, and also in terms of peer-to-peer sharing
- A common theme we heard in all sessions was that very detailed case studies with a one-page summary would be helpful
- Pairing case studies with resources for procurement or off-the-shelf specs/products could also be powerful
- Accessible webinars and trainings are always helpful

- We should create a weekly listserv or forum for people to discuss and build an online community that can crowd-surf answers to questions (searchable by building type or by technology)

Session # 4 – Energy Efficiency Strategies and the Prescriptive Path

Working Principles based on best practices:

- Rule reminder – prescriptive pathway equal to 20% performance pathway
- Break down prescriptive list by
 - Minimum requirements (must-do's and same across all lists)
 - Operations & Maintenance strategies
 - Project-Based strategies
- Create prescriptive paths based on property types – probably 4-5 high level categories (will not match the 80+ property types available in Energy Star Portfolio Manager)
- Weighted values for each action item based on energy savings potential (DOEE or 3rd party)
- Present action items based on cost/time categories:
 - Easy – simple upgrades or operational changes
 - Medium – moderate renovations
 - Hard – substantial improvements

Topic – Prescriptive Pathway Ideas

- Audits and Retro-commissioning should be a minimum requirement. Weight things differently so that the requirements are more incentivized and then remove them as requirements.
- Need for DOEE support in training, off the shelf SOWs, and finding vendors
- DOEE should do random audits to hold people accountable
- Off the shelf Scope of Work would be super helpful for all items
- Alt Compliance pathways seem like a lot of extra work than just the normal prescriptive pathway
- Need to think more about Multifamily properties

Topic – Prescriptive Compliance Process

- Flexibility – to choose which pathway and change their mind during the cycle; to accept potentially delayed compliance for those who are pursuing deeper, more intensive strategies; to have the prescriptive path evolve each cycle – is key to encouraging people to comply and do more
- Certainty - for the first pathway, it is important to establish that before the first cycle and leave it static. Leave flexibility to adopt new things for 2nd cycle and beyond.
- Coaches or some sort of navigator to help offer tailored help to building owners, to identify not only strategies, but financing and encourage thinking beyond one cycle, would be really helpful.
- Continued communication throughout the compliance cycle.
- Alignment across DC agencies to ensure smooth permitting & other points of collaboration.

Make sure that BEPS Prescriptive requirements are not contradicted by code.

- Incentivize or weight prescriptive path items for early compliance (2-3 years)
- Include ability to count 2019-2020 projects toward first compliance cycle.
- Yes to encouraging voluntary 5-year plan for compliance.
- Need vetted list of service providers/contractors/vendors.