

BEPS Task Force Meeting Notes

October 13, 2020

Task Force Member Attendees: Katie Bergfeld, Patti Boyd, Marshall Duer-Balkind, Dave Good, Max Greninger, Adrian Gross, Reshma Holla, Jessica Jones, Cliff Majersik, Todd Nedwick, Matt Praske, Joe Reilly, Jay Wilson

Public Attendees: Andrew Held, Sharon Jaye, Molly Hoffsommer, Kate Johnson, Michael Feldman-Wiencek, Kristian Hoffland, Cet Caldwell, Kevin Carey, Kehan Desousa, Michele Good, Donald Walker, Joe Knackstedt, Sarah Kogel-Mucker, Andrea Foss, Adam Szlachetka, Nathan Jeffay, Mark Bryan, Jonathan Rifkin, Kudret Utebay

The notes reflect the discussion only – please see the referenced slide for content presented.

Agenda:

1. Administrative
 - a. Opened Meeting at 2:34pm
 - b. Attendance taken by roll call (see above) and quorum acknowledged
 - c. Role of Task Force, Agenda reviewed
2. Deep Retrofit Pathway (DER)
 - a. Guiding principles (slide 6)
 - b. DER Types (slide 7)
 - c. “Extended compliance” – Affordable Housing (AH) (slide 8)
 - i. Q: Will there be other requirements along the timeline, like an energy audit or other actions? Hope to leave it flexible to catch all types of issues in AH, but would like to hear if TF members have suggestions.
 - ii. Q: Concerns about “kicking the can down the road”. DHCD – owners may have situations very dependent on funding streams and the higher savings values may have larger implications. Green Bank will offer a pre-development loan (2-3 year head start), but might not meet the timeline for AH owners (GB meeting with loan vendor in the next few weeks).
 - iii. DHCD QAP being adjusted 2-3 years from now. Funding may get very competitive and not all owners could get 40-60% depending solely on QAP funding. And what if subsidies are not available in future cycles? Note these properties will need to meet future, more rigorous QAP requirements in addition to whatever reduction they’re promising for BEPS...Need to consider this interaction.
 - d. Extended Savings and timeline (slide 9)
 - i. Should we offer both a 2-cycle and a 3-cycle? Some affordable housing projects might not have the capital approval to do the work until after the end of the 2nd cycle, right? That would imply a need for three cycles. If a building hit a 60% within 2 cycles, they should get 3 cycles of guarantee waiver.
 - ii. Percentages – 40-60% is quite a large building retrofit, more like a full repositioning. Energy audit doesn’t seem necessary if building is pursuing a

whole building retrofit; auditing existing systems that will be replaced doesn't seem necessary. And doing short-term EEMs in year 1-3 makes funding larger items later very difficult. If a MFAH owner has a robust capital plan prepared or reviewed by a third party might, then perhaps it shouldn't be required to do an audit. So long as the plan is funded and has specific EEMs projected to meet the savings committed to an extended compliance agreement with DOEE.

- iii. Could absolute EUI targets be the goal, instead of a 40-60% savings reduction? On absolute targets, these targets from NBI for the 4A climate zone are worth looking at: <https://newbuildings.org/nbi-releases-zero-energy-performance-targets-for-new-construction-projects/>
- iv. Should we include other property types?
 - 1. Condos, co-op multi-family – older buildings may have long-term fixed income residents; and need more time for the project completion.
 - 2. Public-government owned depending on funding
 - 3. Retail serving under-served communities; examine equity impacts on property type groupings or neighborhoods?
- e. Brainstorming on names – “long-term deep energy retrofit”, “extended retrofit”

3. Prescriptive Pathway EEMs

- a. Guiding principles review (slide 10-11)
- b. Retro-commissioning discussion (slide 12)
 - i. General feedback – if audit shows there is a large amount of savings available, owner should probably use performance pathway; prescriptive pathway items should be more capital intensive. Leave nebulous items off the EEM list.
 - ii. Feedback on the value – retro-commissioning could scale with the scope of the equipment touched in the project? Minimum value (5%) should be offered?
 - iii. How to enforce? Retro-comm. industry doesn't have firm standards to be able to point to. Seattle has more complicated process that took time to set up with multiple staff, standards and training. Would be complicated to set up fairly in DC. Hard to measure O&M plans without actual M&V and time for staff to examine data.
- c. Individual Energy Efficiency Measures (EEM) weighting examples (slide 13)
- d. EEM weighting questions (slide 14)
 - i. Threshold (tolerance) for savings range
 - 1. Idea for using savings near the bottom of the range; if the owner's audit shows higher values attainable, then they should use the performance path – TF members leaning towards this idea.
 - 2. Since Prescriptive pathway is so labor-intensive, owners should get the benefit of the doubt on the savings range.
 - 3. If range is small, use median; if range is wide, lean towards bottom of the range.

- ii. Should there be outer limits to EEMs that have a broad bandwidth with expected savings? If the variables are known, then could adjust the value accordingly (equipment-based vs. behavior-based)
 - iii. Total point value on prescriptive path EEM list? 20 points (each point worth 1% savings)? 100 points? General agreement from TF on 100 points. No need to disclose methodology on the 100-point scale unless it's not straightforward.
- 4. Webinar update (slide 15)
 - a. Oct. 29 special guest is the Hub
- 5. Overall Schedule (slide 16)
 - a. Most of the remaining topics will not be ready to discuss until November/December
 - b. Rules very close to public comment posting (possibly by end of October)
- 6. Next Meeting – November 10
 - a. Canceling October 27 meeting
- 7. Announcements
 - a. Mark Bryan looking for sample RFP language for deep energy retrofits for multifamily buildings. Email DOEE if you have something and we'll pass it along.