

# Welcome to the ESPC Accelerator

May 7, 2014



# This Morning's Agenda

9:00 am Welcome and Opening Remarks

*Alice Dasek, DOE*

9:10 am Introductions and Discussion of Program Goals and Pillar Work

10:30 am Break

10:45 am Open Discussion: Institutionalizing Support for ESPC

*Moderated by John Shonder, Oak Ridge National Laboratory*

## Presenters

- *Al Christopher, Virginia*
- *Peter Berger, Minnesota*
- *Len Hoey, North Carolina*

12:00 pm Welcome Lunch with Conference

*Jefferson East-Lincoln Rooms*

# Introductions

- Name and Organization
- Accelerator Activities to Date
- ESPC Developments Since Joining Accelerator
- Selected Accelerator Barrier for Resolution
- What You Hope to Achieve as Part of the Accelerator

# BREAK



# Discussion: Institutionalizing Support For ESPC

*Moderator:*

John Shonder  
Oak Ridge National Laboratory

*Presenters*

- Al Christopher, Virginia
- Peter Berger, Minnesota
- Len Hoey, North Carolina

# Institutionalize Your ESPC Program

U.S. DOE Better Buildings Summit  
Washington, DC  
May 7, 2014

division of  
**energy**  
resources  
Minnesota Department of Commerce

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# Establish Program Infrastructure

- **Executive Order**
- **Dedicated Staff with ESPC Experience**
- **Contracting and Procurement Documents**
- **Pre-qualified ESCOs**
- **Project Development Process**
- **Robust Outreach Campaign**
- **On-Going Technical Assistance**

# Issue Executive Order

- Achieve aggregate 20% reduction in energy use
- Maintain B3 Energy Benchmarking data current
- Establish site-specific goals for reducing energy use
- Identify all major energy-consuming building systems within 5 years of end of useful life
- Assess BAS and monitoring points to identify opportunities to improve effectiveness
- Implement energy efficiency and renewable energy improvements utilizing GESP, PBEEEP, ...
- Participate in the federal “Better Buildings Initiative”



# Dedicate Program Staff

- **EO 11-12 Established Office of Guaranteed Energy Savings Programs**
- **Program Manager experienced in development of ESPC projects**
- **Project Manager experienced in implementing ESPC projects**
- **Utilize Conservation Improvement Plan engineering resources**

# Develop Contracting and Procurement Documents

- Vetted Master Contract with Pre-qualified ESCO's
- Open Book Pricing, Maximum Markups and Fees, GMP
- Subcontractor Pre-qualification Process
- Savings Guarantee Requirements
- Measure & Verification Guidelines
- Startup & Commissioning Guidelines
- Pro Forma Guidelines
- Interagency and Joint Powers Agreements

# Pre-qualify ESCOs

- Issue RFQ pre-qualify
- Establish pool of ESCOs to participate in ESPC program
- Establish maximum markups and fees
- Negotiate Master Contact with each ESCO

# Establish Robust Outreach Campaign

- **Form Energy Services Coalition (ESC) chapter for your state**
- **Form Energy Efficiency Committee for State-owned Buildings**

# Clearly Define Project Development Process

| Process Step               | Activity                                                                                              | Typical Duration        | Milestone                                        |
|----------------------------|-------------------------------------------------------------------------------------------------------|-------------------------|--------------------------------------------------|
| 1 – Opportunity Assessment | Meetings with COMM to review GESP, B3 data, facility needs, issues, and goals                         | 1 – 3 months            | Joint Powers Agreement                           |
| 2 – Define Project Goals   | Energy Savings; GHG Emission Reduction; Renewable Portfolio; Building Public Disclosure; Job Creation | 1 – 3 months            | Issue Site-Specific RFP                          |
| 3 – ESCO Selection         | RFP evaluation and ESCO selection                                                                     | 1 – 3 months            | Issue Work Order Contract                        |
| 4 – Project Development    | Perform Investment Grade Audit to develop project scope, cost, savings and funding                    | 3 – 6 months            | Issue Work Order Contract Amendment              |
| 5 – Project Implementation | Installation of Energy Conservation Measures                                                          | 6 – 12 months           | Certification of Final Completion and Acceptance |
| 6 – Performance Period     | Review Measurement & Verification Reports                                                             | 5 – 25 years (on-going) | Annual M&V Report                                |

# Provide On-going Technical Assistance

- **Opportunity Assessment**
  - B3 Benchmarking Data
  - Needs, Issues and Goals
- **Project Development Assistance**
  - ESCO Selection Advisor
  - Contract Document Review
  - Project Implementation Oversight
- **Annual Project Performance Evaluation**

# **LUNCH**

## **Jefferson East-Lincoln Rooms**

### **Return at 1:00 PM**



# Afternoon Agenda

Feedback and Focus Groups on e-Project Builder

*Facilitators: Liz Stuart, Lawrence Berkeley National Lab  
Chris Wagner, NASEO*

1:00 pm Demonstration of e-Project Builder

2:15 pm Break

2:25 pm Facilitated Feedback on ESPC Data Collection Needs

3:25 pm Break

3:35 pm Facilitated Feedback on Data Reporting Outputs

4:00 pm Closing Remarks and Adjourn

*Alice Dasek, DOE*



# Demonstration of e-Project Builder

*Presenter:*

Liz Stuart  
Lawrence Berkeley National Laboratory

# BREAK



# Feedback on ESPC Data Collection Needs

*Facilitators:*

Liz Stuart, Lawrence Berkeley National Lab  
Chris Wagner, NASEO

# BREAK



# Feedback on Data Reporting Outputs

*Facilitators:*

Liz Stuart, Lawrence Berkeley National Lab  
Chris Wagner, NASEO

# Next Steps

- **MAY:** DOE Processes ePB Feedback
- **MAY:** DOE and Partner Finalize IBRP (Individual Barrier Resolution Plan)
- **SUMMER:** ePB Training Begins
- **JUNE:** Working Groups and IBRP Work Begin
- **SEPTEMBER:** ePB Roadtesting Begins

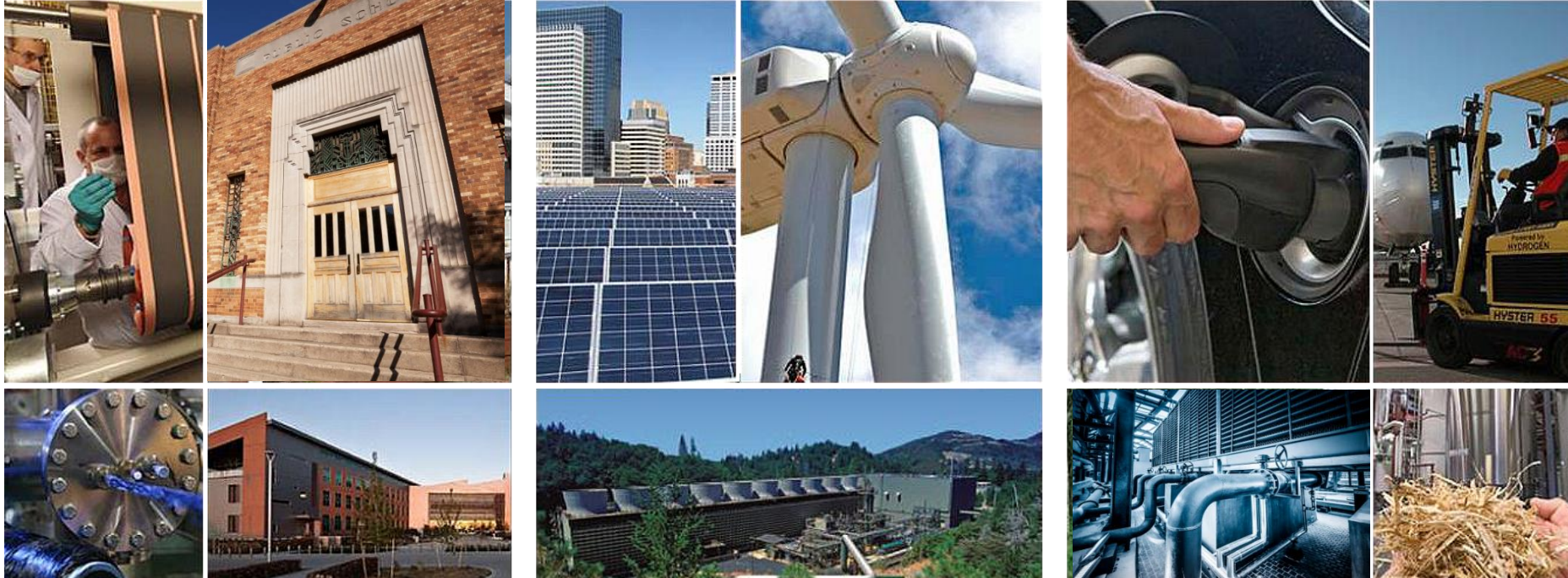
# Thank You For Attending

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# eProject Builder



## Accelerator Energy Savings Performance Contracting Meeting Better Buildings Summit May 7, 2014



Energy Efficiency &  
Renewable Energy



# Overview of Session

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1. Provide overview and demonstration of eProject Builder (ePB) ESPC database tool
  - Break
2. Collect feedback from Accelerator partners on data input fields
  - Break
3. Collected feedback on reporting and output needs
4. Discuss next steps and future engagement with Accelerator partners

# eProject Builder (ePB) Background

- FREE web-based system for entering & tracking ESPC data
- Developed by Berkeley Lab for U.S. DOE
- Version 1.0 developed for federal ESPC projects
  - To meet need for standardized data collection and reporting
- Now being adapted for state and local ESPC projects

[Benchmarking](#) [Help/Documentation](#) [About](#)



eProject Builder enables Energy Services Companies (ESCOs) and their contracting agencies to:

1. upload and track project-level information
2. generate basic project reports required by local, state, and/or federal agencies
3. benchmark new Energy Savings Performance Contract (ESPC) projects against historical data

Please sign in

**Username:**

**Password:** [Forgot password?](#)

New to ePB? [Request an Account](#)



# ePB Features and Benefits Overview

- Ready access to your ESPC financial & performance info
  - Track projects for life of the contract – up to 25 years
- Standardized ESPC data collection and reporting
- Project-centric for projects that can span multiple bldgs/sites
  - Both Project-level and ECM-level data
  - Unlike Portfolio Manager which is single building-centric
- Secure, with varying access/permission levels as appropriate
- Provides ESPC statistics for benchmarking your projects
  - From aggregated national ESPC data across all market segments

# ePB Features and Benefits Overview (cont.)

- Customers (state/local) initiate projects; ESCOs complete data
- “Sandbox” for ESCOs to develop project scenarios
  - Excel-based upload template with standardized calculations
  - ESCO can run scenarios in template; share with customers
  - Standard calculations provide transparency into ESCO proposals
- Quickly output project data / generate reports
  - Streamlined access to your project information to help you share your success stories
  - Educate decision-makers about the benefits of ESPCs
- ESCOs also interested in centralized online system

# Timeline 2014

- Spring/early summer: solicit initial state/local feedback on data input and output
- Summer: Version 1.0 “soft launch”
  - Designed for federal customers but ready to accept any ESPC
- Summer: Training sessions for Accelerator Partners and their ESCOs to begin “road testing” the system
  - Provide feedback on state/local needs for the system
- State/local customer feedback will inform Version 2.0 (release date TBD)

# Potential End-Users of ePB System and Outputs

- State energy offices / state ESPC programs
- Other state agencies (e.g., General Services)
- Local partners (e.g., municipalities, school districts)
- State legislatures and Governor's offices
- ESCOs
- Utilities (UESC projects)
- Federal agencies – including ENABLE projects
- Private commercial customers

# Outreach to ESCOs

- Current: concurrent outreach to customers and ESCOs
- Partnering with NAESCO on long-term outreach strategy to ESCO industry
  - Also working through Energy Services Coalition
- Federal ESPC ESCOs will be required to use ePB in 2015
  - As condition of new federal contract solicitation
- Select ESCOs will “road test” system beginning this summer, provide feedback for Version 2.0

# ePB Demonstration





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# Facilitated Feedback on Data Input Needs

# Facilitated Feedback on Data Input Needs

- Session Goals
  - Identify general themes/consensus regarding data inputs that state and local ePB users think are necessary.
  - We are looking for a “sweet spot” of what all states would want—ePB is not meant to accommodate each and every nuance of state and local programs.
  - From our discussion, we hope to identify the ESPC project data fields that would be helpful and useful to collect.
    - ePB can have “required” fields as well
    - State/local users could identify a set of fields that their ESCOs need to fill in



# ePB “Foundational” Data Fields

- Project Summary Information, e.g.,
  - Contact information: Customer, ESCO, facilitator, financier, agency
  - Agreement type, financing type/source, interest rate
  - Total amount financed, total cost of financing
  - Purchase order #, construction period (months)
- Project-Level Data
  - Baseline energy/resource use, baseline costs
  - ESCO estimated and guaranteed dollar savings
- Per-ECM Data
  - Implementation cost
  - Baseline energy/resource cost and use (e.g, kWh, MMBtu, gallons)
  - ESCO-estimated cost and resource savings



# Question 1: Current Data Requirements

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**What data on ESPC projects, if any, does your current ESPC program require?**



## Question 2: Project-Level Data Fields

**Beyond the foundational data fields presented earlier, what additional project-level data (e.g., general information, financial information, performance information) would it be helpful for your ESPC program to track?**

**Be prepared to share 3 or 4 data fields that your group had strong agreement about including.**

# Worksheet: Project-Level Data Fields

- Basic project information
  - Contact information: Facilitator, Financier, Finance Specialist, Agency
  - PO#, ESCO contract number, award date
- Project characteristics
  - List of sites, list of buildings
  - Floor area of project
- Project-level financial information
  - Utility/water rate escalation rates over life of contract
  - Annual incentives and other payments (e.g., RECs)
  - Project-related expenses incurred each year of the contract



## Question 3: ECM-Level Data Fields

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**What types of energy conservation measure (ECM) data would be helpful to collect within ePB?**

**Be prepared to share the 3 or 4 data fields that your group had strong agreement about including.**

# Worksheet: ECM-Level Data Fields

- ECM description
  - ECM size and coverage
  - Up-front incentives applied per-ECM
- Per-ECM annual baseline usage and cost
  - Baseline energy and other resource usage (e.g., kWh, MMBtu)
  - Baseline cost
  - Baseline non-energy cost
- Per-ECM annual estimated project savings
  - Estimated energy and other resource savings
  - Estimated cost savings
  - Estimated non-energy cost savings



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# BREAK



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# Feedback on Data Reporting Outputs and Needs



# Facilitated Feedback on Data Input Needs

- Session Goals
  - LBNL and DOE are interested in feedback from potential ePB state and local users regarding the types of reporting that you need to do.
    - Current types of data you like to report
    - Additional types of reports or data outputs you would like ePB to generate
  - This will be an iterative process and we would like to establish some basic reporting and output targets in the short-term.



# Question 4: Data Reporting Feedback

## Current state or local examples of reporting requirements?

1. How could ePB help you save time?
  2. Can you provide specific examples of analysis, charts, trends, or aggregate information that you would like to easily pull from ePB?
  3. What types of metrics do you like to report?
- Consider potential end-users or audiences for ePB reports:
    - State Energy Offices; other state agencies; Local governments (cities, municipalities, school districts, etc.); State legislature; Local elected officials; Governor/Governor's Office; ESCOs



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# Closing and Next Steps



# Closing and Next Steps

- ePB Marketing Materials for state/local government and ESCOs have been developed; outreach to state/local users has begun
- ePB development (data input fields/reporting outputs) will continue over the next several months
- Beta, Federal version of ePB is due to launch early summer 2014; state/local version will follow
- LBNL/DOE/NASEO will offer ePB training starting summer 2014
- We appreciate continued engagement/feedback so that ePB can be a helpful tool in your ESPC program



# Contact Information

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Chris Wagner: [cwagner@naseo.org](mailto:cwagner@naseo.org)

Please contact us for ePB demonstrations, additional feedback, or other ideas.

Thank You!!