



## CITY COUNCIL AGENDA REPORT

**Meeting Date:** February 20, 2020

**From:** Adrienne Etherton, Sustainability Management Analyst

**Subject:** Brisbane Building Efficiency Program Implementation Contract

### Community Goal/Result

Ecological Sustainability - Brisbane will be a leader in setting policies and practicing service delivery innovations that promote ecological sustainability

### Purpose

To approve a Professional Services Agreement (PSA) for Implementation of the Brisbane Building Efficiency Program with consultant The Energy Coalition.

### Recommendation

Approve the attached PSA with The Energy Coalition for \$99,000.

### Background and Discussion

In 2018, staff received a \$200,000 grant for a two-year “Comprehensive Commercial Building Efficiency Program” from the Bay Area Air Quality Management District’s Climate Protection Grant Program. The program includes two phases: (1) adoption of an ordinance focused on energy and water use in existing commercial buildings; (2) implementation of the ordinance including developing systems, training and educational resources, and a “toolkit” for potential streamlined adoption by other agencies. After a competitive RFP process, The Energy Coalition was selected to consult on the first phase, which was completed in December 2019 with the adoption of Ordinance 644. Staff released an RFP for the Implementation Phase on January 3, 2020 and notified 13 potential contractors, including all proposers from phase one. The Energy Coalition was the sole proposal received; it was responsive, meets the expected scope of work, and is within the allocated budget.

### Fiscal Impact

Funding for this contract is within the budget of the grant funds received. (Project OE001)

### Attachments

1. Professional Services Agreement (PSA BBEP TEC)
2. TEC Proposal

Randy Breault, Public Works Director

Clay Holstine, City Manager

## AGREEMENT FOR PROFESSIONAL SERVICES

**THIS AGREEMENT**, dated \_\_\_\_\_, is made by and between THE CITY OF BRISBANE, a municipal corporation ("City"), and The Energy Coalition (TEC), a California-based 501(c)3 nonprofit ("Consultant").

### RECITALS

A. City desires to retain Consultant for the performance of certain professional consulting services for implementation of the Brisbane Building Efficiency Program ("the Project"), as developed under prior Professional Services Agreement and codified in Ordinance 644.

B. Consultant represents that Consultant is specially trained, experienced, and qualified to provide such professional services and is willing to do so pursuant to the terms and conditions of this Agreement.

### AGREEMENT

1. **Scope of Services.** Subject to the direction and approval of City through its staff that City may provide from time to time, Consultant shall perform the services described in Exhibit A attached hereto and incorporated herein by reference. All services shall be performed to the reasonable satisfaction of the City department head in charge of the Project.

2. **Time of Performance.** The services of Consultant shall commence upon the execution of this Agreement and shall be satisfactorily completed in accordance with the time schedule set forth in Exhibit A attached hereto and incorporated herein by reference, unless subject to delays beyond the reasonable control of Consultant.

3. **Responsible Personnel.** The personnel acting on behalf of Consultant primarily responsible for performance of the services hereunder shall be Marc Costa.

4. **Compensation.** As compensation for all services to be performed by Consultant under this Agreement, Consultant shall be paid the amounts set forth in Exhibit A attached hereto and incorporated herein by reference. In no event shall Consultant's total compensation exceed the sum of \$99,000 without additional written authorization from City. Payment by City under this Agreement shall not be deemed a waiver of defects, even if such defects were known to City at the time of payment.

5. **Method of Payment.** Consultant shall submit billings to City pursuant to a deliverable-based payment schedule to be negotiated between City and Consultant. In no event shall the Consultant's payment for a deliverable-based payment schedule item exceed 80% of the full value of the deliverable until such time as the deliverable has been accepted by the city and deemed complete. Alternatively, City may authorize Consultant to submit billings to City describing in detail the work performed for which payment is requested, the date the services were performed, the number of hours spent and by whom, and a description

of any reimbursable expenditures. Billings shall be submitted monthly, or at such other time as agreed upon between City and Consultant. City shall pay Consultant no later than 30 days after approval of the invoice by City staff. If City objects to all or any portion of the billing, City shall notify Consultant of the nature of such objection and the amount in dispute. City shall pay when due the portion of the billing, if any, that is not in dispute. The parties will make a good faith effort to settle the disputed billing through good faith negotiations.

6. **Maintenance and Inspection of Records.** Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, time cards, and other records or documents relating to charges for services or expenditures charged to City, for a minimum of three (3) years from the date of final payment to Consultant under this Agreement and shall make the same available to City or its authorized representatives for inspection and audit, at any time during regular business hours, upon written request by City. The right of inspection shall include the right to make extracts and copies.

7. **Assignment and Subcontracts.** Consultant acknowledges that Consultant's special skill and expertise is a material consideration for City entering into this Agreement. Consultant shall not assign, subcontract, or delegate to any other party the performance of any services to be rendered by Consultant under this Agreement without the prior written approval of City. Each subcontractor shall agree in writing to comply with all of the applicable terms and conditions of this Agreement.

8. **Correction of Work.** Consultant shall promptly correct any defective, inaccurate or incomplete tasks, deliverables, goods, services, or other work, without additional cost to City. The performance or acceptance of services furnished by Consultant shall not relieve Consultant from the obligation to correct subsequently discovered defective, inaccurate, or incomplete performance of Consultant's services hereunder.

9. **Ownership of Documents.** All plans, studies, documents and other writings prepared by and for Consultant in the course of performing its services under this Agreement, except working notes and internal documents, shall become the property of City upon payment to Consultant for such work, and City shall have the sole right to use such materials in its discretion without further compensation to Consultant or to any other party. Consultant shall, at Consultant's expense, provide such reports, plans, studies, documents, and other writings to City upon written request. Consultant shall not be responsible for any reuse of such documents by city which is unrelated to the Project and City agrees to indemnify, defend, and hold Consultant and subcontractors harmless against any claims of liability arising from such reuse by City.

10. **Independent Contractor.** Consultant is, and at all times shall remain, an independent contractor, and not an agent, officer or employee of City. As an independent contractor, neither Consultant nor any of its agents or employees shall be entitled to any salary, fringe benefits, worker's compensation, retirement contributions, sick leave, insurance or other benefit or right connected with employment by City, or any compensation other than as provided in this Agreement. Consultant shall have no power or authority to bind City to any contract or otherwise to incur any obligation or liability for, or on behalf, or in the name of City.

11. **Licenses.** Consultant represents and warrants to City that it has all licenses, permits, qualifications, insurance, and approvals of whatsoever nature that are legally required of Consultant to practice its profession. Consultant shall, at its sole cost and expense, keep and maintain such licenses, permits, qualifications, insurance, and approvals current and in full force and effect at all times during the term of this Agreement. Consultant shall maintain a current City of Brisbane business license.

12. **Compliance with Standards of Care and Laws.** Consultant shall adhere to the standard of care in its profession and shall comply with all applicable federal, state, and local laws, codes, ordinances, and regulations in connection with the performance of its services under this Agreement.

13. **Indemnity.** Consultant shall indemnify, defend, and hold City, its officers, officials, agents, employees and volunteers, harmless from and against any and all claims, demands, causes of action, losses, damages, injuries, expenses and liabilities, direct or indirect, including attorney's fees, arising out of or in any manner relating to the negligent performance by Consultant or any of its subcontractors, agents, or employees, subcontractors, agents, or employees to comply with any of their obligations contained in this Agreement or its failure to comply with any of the its obligations contained in this Agreement, and City shall not be liable for any acts or omissions of Consultant or any of its subcontractors, agents, or employees.

14. **Insurance.** Consultant, at its own expense, shall procure and maintain, for the duration of this Agreement, insurance policies which satisfy the following requirements:

(a) Type of policies and coverage:

- (1) *General Liability Coverage.* Consultant shall maintain commercial general liability insurance in an amount not less than \$1,000,000 per occurrence for bodily injury, personal injury, and property damage, providing coverage at least as broad as Insurance Services Office Commercial General Liability form CG 0001 (Ed. 11/88). If the form of insurance with a general aggregate limit is used, either the general aggregate limit shall apply separately to the work to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit.
- (2) *Automobile Liability Coverage.* Consultant shall maintain automobile liability insurance in an amount not less than \$1,000,000 combined single limit for each occurrence, for bodily injury and property damage, providing coverage at least as broad as Insurance Services Office form CA 0001 (Ed. 12/90) Code 1 (any auto).
- (3) *Workers' Compensation and Employer's Liability Coverage.* Consultant shall maintain workers' compensation insurance as required by the State of California and employer's liability insurance in an amount not less than \$1,000,000 per occurrence, for any and all persons employed by Consultant in connection with the performance of services under this Agreement. In the alternative, Consultant may rely on a self-insurance program to provide this coverage so long as the program of self-insurance complies fully with the

provisions of the California Labor Code. The insurer, if insurance is provided, or Consultant, if a program of self-insurance is provided, shall waive all rights of subrogation against City for loss arising from work performed by Consultant for City.

- (4) *Professional Liability Coverage.* Consultant shall maintain professional errors and omissions liability insurance in an amount not less than \$1,000,000 per occurrence, covering negligent acts, errors or omissions which may be committed by Consultant in the performance of its services under this Agreement.
- (b) Endorsements: Each general liability and automobile liability insurance policy shall contain, or be endorsed to contain, the following provisions:
- (1) The City, its officers, officials, employees, agents and volunteers are to be covered as insureds as respects: liability arising out of activities performed by or on behalf of Consultant; products and completed operations of Consultant; premises owned, occupied or used by Consultant; or automobiles owned, leased, hired or borrowed by Consultant. The coverage shall contain no special limitations on the scope of protection afforded to City, its officers, officials, employees, agents, or volunteers.
  - (2) For any claims related to the Project, Consultant's insurance coverage shall be primary insurance as respects the City, its officers, officials, employees, agents, and volunteers. Any insurance or self-insurance maintained by City, its officers, officials, employees, agents, or volunteers shall be excess of Consultant's insurance and shall not contribute with it.
  - (3) Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to City, its officers, officials, employees, agents, or volunteers.
  - (4) Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
  - (5) Consultant's insurance coverage shall not be suspended, voided, canceled, or reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to City.
- (c) Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared to and approved by City. At City's option, Consultant shall demonstrate financial capability for payment of such deductibles or self-insured retentions.
- (d) Acceptability of Insurers. Insurance is to be placed with insurers having a current A.M. Best rating of no less than A:VII, unless otherwise approved by City in writing.

- (e) Verification of coverage. Consultant shall provide certificates of insurance with original endorsements to City as evidence of the insurance coverage required by this Agreement. Certificates of such insurance shall be filed with City before commencement of work by Consultant. At the request of City, Consultant shall provide complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by this Agreement.

15. **Notices.** Any notices required or permitted to be given under this Agreement shall be in writing and shall be either personally delivered or sent by certified mail, return receipt requested, addressed to the other party as follows:

To City	City of Brisbane Attn: Adrienne Etherton 50 Park Place Brisbane, CA 94005-1310
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To Consultant	The Energy Coalition Attn: Marc Costa 47 Discovery, Ste 250 Irvine, CA 92618
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16. **Resolution of Disputes.** In the event of any dispute between the parties pertaining to this Agreement, the parties shall endeavor in good faith to resolve such dispute through mediation before the commencement of legal action by one party against the other.

17. **Termination of Agreement.** This Agreement may be terminated immediately by either party, effective upon written notice, should the other party commit any material default in the performance of its obligations hereunder. This Agreement may also be terminated by either party, for any reason, upon fifteen (15) day's prior written notice to the other party. In the event this Agreement is terminated by City through no fault of Consultant, Consultant shall be compensated for all services performed to the date of termination.

18. **Equal Opportunity Employment.** Consultant warrants that it is an Equal Opportunity Employer and shall comply with applicable regulations governing equal opportunity employment.

19. **Miscellaneous Provisions.**

- (a) Severability. Should any portion of this Agreement be declared void or unenforceable in a final decision by a court of competent jurisdiction, such decision shall not affect the validity of the remainder of this Agreement, which shall continue in full force and effect, provided that the remainder of this Agreement can be reasonably interpreted to implement the intention of the parties.
- (b) Entire Agreement. This Agreement constitutes the entire agreement between the parties and supersedes and cancels all prior agreements or understandings, whether written or verbal.

- (c) Amendments. This Agreement may be modified or amended only by a written document duly executed by both City and Consultant.
- (d) Waiver. The waiver of any breach or default under this Agreement shall not constitute a continuing waiver of a subsequent breach of the same provision or any other provision of this Agreement.
- (e) Execution. Each party warrants that the individuals signing this Agreement on its behalf have the legal power and authority to do so and to bind the party to this Agreement.
- (f) Successors and Assigns. Subject to the restriction against assignment and subcontracting, this Agreement shall be inure to the benefit of and shall be binding upon the heirs, personal representatives, successors, and assigns of the parties hereto.

\* \* \* \*

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**IN WITNESS WHEREOF**, the parties have executed this Agreement the day and year first above written.

THE CITY OF BRISBANE

By: \_\_\_\_\_  
Terry O'Connell, Mayor

ATTEST:

\_\_\_\_\_  
Ingrid Padilla, City Clerk

APPROVED AS TO FORM:

  
\_\_\_\_\_  
Michael Roush, Legal Counsel

CONSULTANT:  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
Typed Name, Title

## EXHIBIT A

### Description of Services, Compensation, Schedule

#### **BAAQMD Deliverable #2.2 / Task 2.2 - Convene Kick-off Meeting**

Convene a project kick-off meeting with city staff, consultants and the Open Space and Ecology Committee project liaisons to discuss project goals and schedule.

#### **Deliverables:**

- Kick-off meeting agenda, summary of outcomes and list of participants

#### **BAAQMD Deliverable #2.3 Develop Web Portal / Task 2.3.1 - Develop City Infrastructure**

To manage the launch and administration of the adopted ordinance, The Energy Coalition (TEC) and its technology subcontractor, Maalka, will deliver all city infrastructure needed for both the benchmarking and audit requirements. This process will occur in two phases: the first phase is to develop the requirements, datasets, and software infrastructure, and the second phase is to test and refine the infrastructure during the early compliance pilot. This process will ensure the City receives the necessary deliverables and training to operate the ordinance after our team completes the scope of work. First, our team will review the ordinance requirements with the City and define expectations of compliance in year one and subsequent years. Based on TEC's experience, cities have exercised flexibility with building owners in the early years of ordinance compliance and evolved the enforcement in subsequent years. Critical activities in this deliverable include engaging the Environmental Protection Agency (EPA) on ENERGY STAR Portfolio Manager (ESPM) reporting infrastructure and working with the California Energy Commission (CEC) to verify that ESPM reporting fields and deadlines align with statewide requirements. Our team will prepare the software infrastructure for the ordinance audit requirements. Finally, our team will coordinate with the Department of Energy (DOE) and the Pacific Northwest National Laboratory (PNNL) on Asset Score and Audit Collection Tools.

Unlocking technical assistance capabilities is crucial to increase compliance and customer satisfaction. Our team will coordinate a data release form for tenants with PG&E and generate a compliance checklist for owners. We will align the details of the compliance building owners' requirements with neighboring cities to reduce the complexity of navigating different compliance requirements. Automation, especially of the audit requirements, using DOE and Maalka software will alleviate the administrative burden for Brisbane. Setting up both benchmarking and audit infrastructure in advance will enable the City to use BAAQMD funds to their full extent while our team is on contract.

#### **Deliverables:**

- URLs to Portfolio Manager report template
- Asset Score and Audit Template links for BBEP reporting



## **BAAQMD Deliverable #2.3 Develop Web Portal - Task 2.3.2 - Develop Web Portal**

An easy to navigate and aesthetically pleasing web portal significantly reduces customer confusion and signals Brisbane is a leader in a new generation of benchmarking and audit ordinances. The first step is to review best practices from other cities' portals and to define the requirements and user experience wireframe for Brisbane's portal. The portal can be hosted on the City's website or through Maalka. Our team has created numerous web portals for local governments, including the Clean Power Alliance, which is the country's largest community choice aggregation program. After the wireframe is approved, our team will gather and generate content for the portal, leveraging the thorough documentation and resources we have already developed for the CEC's benchmarking program. This quick-start approach will allow the City and our team to focus on thoughtful messaging and content instead of basic formatting and layout. Through TEC's regulatory experience with the California Public Utilities Commission, we will create easy to navigate resources for BayREN, PG&E, and Peninsula Clean Energy programs alongside specific measures that align with the audit compliance pathways.

Owners may not understand where to start with compliance. To address this, our team will develop a personalized compliance checklist providing a roadmap for each disclosable property. Each owner will have a guide outlining whether they have to benchmark and perform an audit or an asset score.

Our team proposes housing compliance checklists and other resources on the city portal that integrates marketing, outreach, education and compliance administration in one system. This system can be offered via the Maalka platform, the DOE's Standard Energy Efficiency Database Platform, or Salesforce integrations. Salesforce functions as a customer relationship management (CRM) tool and can integrate with MailChimp email marketing and Zoom screen sharing for seamless outreach and compliance notice tracking. All of these features can be delivered within the available budget, and the level of integration can be customized to align with the City's anticipated budget for ongoing management of their ordinance portal and infrastructure. Leveraging TEC and Maalka's GIS strengths with ArcGIS, we will create automated public and private data and visualization feeds, which can be used to manage and promote the success of the programs. Data and visualization feeds will be designed so that the City can manage them after our team trains City staff.

### **Deliverables:**

- URL for finalized and fully-operational web portal
- Compliance Checklist Roadmaps

## **BAAQMD Deliverable #2.4 / Task 2.4 - Conduct Staff Training on Web Portal**

The Energy Coalition understands the importance of a robust yet easily digestible in-person web portal training for City staff. The team will prepare a step-by-step presentation and training guides, including an overview of benchmarking and auditing a building, submitting a report, and pulling data from ESPM, to ensure that the web portal can be maintained by City staff. Since City staff will need to communicate features of the portal to those submitting compliance data, the training guide will incorporate a script explaining common features of the portal, useful tips and tricks, and troubleshooting topics. Zoom screen sharing is the most useful tool available for providing compliance technical assistance and portal guidance to

building owners. Thus, TEC recommends the City uses Zoom and will incorporate training for City staff on this tool.

Some of the biggest challenges City staff face during compliance are sifting through extensive and diverse types of data. Our team will ensure both the presentation and guide include techniques for evaluating benchmarking and audit compliance; this will include a demonstration on populating and updating public-facing features of compliance data. Finally, the presentation and guide will detail the process of compiling and submitting data to share compliance reports with the CEC. A copy of all resources will be made available for any City staff who are not able to attend the in-person training. Additionally, our team will provide language that the City can distribute through internal channels informing staff of program resources and updates.

**Deliverables:**

- Training materials, including user’s manual/guide for managing the web portal
- Agenda, notes, recording, and list of participants
- Delivery and sign-off of in-person training

**BAAQMD Phase 2 Deliverable #2.5 / Task 2.5 - Conduct Education and Outreach**

Engaging internal and external stakeholders during the launch and implementation phase of the program will be critical to its strong start and long-term success. Once internal program overviews and introductory trainings have been completed, external stakeholders will need to be engaged. TEC will approach this process by first refreshing market analysis to best understand the building stock and any changes in Brisbane. Then, TEC will update its existing contact list to ensure as many building owners and other stakeholders as possible are captured during engagement. To capture the broadest audience possible, TEC will develop surveys to gauge availability and interest for in-person and online training. Surveys will also help to determine which assistance materials would be most beneficial. While collecting information on stakeholders and buildings, TEC will simultaneously begin the development of educational content for sharing with stakeholders and for posting on the portal. This content includes an FAQ document that will be updated based on common questions throughout engagement, a troubleshooting form, a program introduction, and a compliance flowchart. Additional resources we will develop include one-pagers, fact sheets, webinar slides, compliance manuals, measure and rebate lists, support call scripts, helpful tips and tricks for compliance, and marketing materials.

TEC recommends an initial event for all stakeholders is hosted at City Hall as a ceremonial launch for the program. The all-stakeholder launch will then be followed by two in-person comprehensive ESPM trainings on topics such as requesting data, gathering building data, inputting to ESPM, quality checking data, submitting data, troubleshooting common issues, and popular tips and tricks. Where appropriate, TEC will invite guest speakers such as engineers or Pacific Northwest National Laboratory (PNNL) staff to share case studies and best practices. In-person events will be supplemented by at least two online training events, including one webinar for building owners, property managers, and leasing companies, and another webinar for engineers and consultants to understand technical requirements. TEC will also be available for one-on-one phone support for building owners and will train staff to become experts at troubleshooting compliance assistance needs via the Zoom platform. As part of the audit training, TEC will partner with PNNL and voluntary practitioners to host

an audit demonstration event with the Chamber of Commerce to demystify the audit compliance process and showcase the web portal and resources. A survey will be distributed after each event to gauge effectiveness and to understand any remaining needs.

**Deliverables:**

- Updated list of covered buildings
- List of ways information on web portal has been communicated to City staff
- For all trainings and webinars: agendas, presentations and other materials, participant list
- For audit demonstration event: promotional announcements or materials, video or photos of the event, list of participants

**BAAQMD Phase 2 Deliverable #2.5: Conduct Education & Outreach Task 2.5.1 - Voluntary Pilot Benchmarking**

A voluntary benchmarking pilot is immensely helpful to ensure a smooth launch and implementation of the program. By engaging a smaller sample of building owners that reflect every size building and compliance scenario, the City can fully test their infrastructure to ensure self-sufficient delivery of the program after BAAQMD funds are exhausted. Connecting building owners with resources on the web portal will help spur action and energy savings, which is the overall intent of the ordinance.

TEC will work with the City to identify goals and priorities for the pilot and make recommendations about who should be included and what compliance metrics to track (number of buildings, percent of square footage, etc.). TEC recommends that all building types are included in the pilot (commercial, industrial, multifamily, and city facilities) to identify gaps in infrastructure development early and to demonstrate leadership. The City may consider including a small number of building owners seeking exemptions in the pilot to test those processes, as well. Early compliers can gain recognition through case studies based on their testimonials and experience, and case studies also serve as a valuable educational tool for compliers following launch. Early compliers will also receive Energy and Water Benchmarking Performance Reports that will help them understand their progress towards City and State performance targets.

TEC will develop a structure for tracking early complier feedback, which will help shape the program’s educational materials and training content. TEC will work with the City to develop a benchmarking pilot scope and timeline that can serve as a model for a future auditing phase pilot before the auditing deadline.

**Deliverables:**

- Early compliance dataset
- Testimonials from building owners and stakeholders in the pilot
- Early compliance reports and results for web portal

**BAAQMD Phase 2 Deliverable #3.1 - Task 3.1 - Produce Ordinance “Toolkit”**

A comprehensive toolkit will ensure Brisbane’s ordinance has an opportunity to grow and magnify in impact. TEC understands the tremendous value of having this ordinance be both replicable and scalable so that local governments of all sizes and varieties can adopt their own version and contribute to water and energy use reductions. This toolkit will make the

implementation of progressive benchmarking and auditing ordinance less intimidating, and ideally will foster region-wide development of similar ordinances and cost-sharing of infrastructure. Our team will design the toolkit specific to California local governments and further customize it for neighboring cities to ensure it is accessible and implementable for them.

TEC is prepared to quickly and efficiently develop this toolkit of best practices and templates based on the support we provided through phase one development of the ordinance and engagement to stakeholders. Our team will assemble all necessary templates for the toolkit, including the ordinance framework and materials to support communication (one-pager for City staff, a script for one-on-one discussions with stakeholders, and presentations with flowcharts). Additionally, TEC will compile all relevant stakeholder engagement and planning templates for the toolkit, including a stakeholder identification and prioritization mapping activity, engagement and outreach planning document, and all presentations, agendas, and outlines for workshops and working group engagement with stakeholders. TEC will also incorporate best practices tools to increase the appeal for local governments to adopt such an ordinance. These best practices tools include a summary of feedback received from all stakeholder engagement, guides on how to structure outreach to encourage online and in-person attendance, and tips on incorporating flexibility and continual feedback for improvement during launch and implementation of the program.

**Deliverables:**

- Ordinance toolkit
- URL for the online version of the toolkit

**BAAQMD Phase 2 Deliverable #3.2 - Task 3.2 - Promotion of Ordinance to Local Governments**

TEC will support City staff's promotion of the ordinance program to other local governments by assisting with, lining up or providing presentations or reports to jurisdictions, groups, or conferences as applicable/requested.

**Deliverables:**

- Schedule for presentations to local governments/networks
- Copies of presentations or reports given

## Timeline and Budget

Task	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Payment
2.2 Kick-off Meeting										\$7,000
2.3.1 Develop City Infrastructure*										\$23,000
2.3.2 Draft Web Portal Design For City Review										
2.3.3 Final Web Portal										
2.4 Conduct Staff Training on Web Portal**										\$12,000
2.5.1 Voluntary Pilot Benchmarking										\$35,000
2.5.2 Conduct Education and Outreach										
3.1 Produce Ordinance “Toolkit”										\$15,000
3.2 Promotion of Ordinance to LGs										\$2,000
4.0 Monitor Outcomes and Results***										\$5,000
<b>TOTAL</b>										<b>\$99,000</b>

*\*City benchmarking infrastructure will be developed by May 2020 and will be further updated and refined in August after the conclusion of the Voluntary Pilot Benchmarking. In July audit related infrastructure will be complete.*

*\*\*Training on portal will be completed in 2 phases - one for benchmarking and one for audits.*

*\*\*\*Outcomes and results will be based on the Voluntary Pilot Benchmarking.*



# The Energy Coalition Response to Consulting Services for the Implementation of the Brisbane Building Efficiency Program

## *Proposal*

### **Contact:**

Adrienne Etherton, Sustainability Management Analyst  
City of Brisbane, Department of Public Works

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## A. Cover Letter

January 24, 2020  
50 Park Place, Brisbane, CA 94005

Dear Adrienne Etherton,

Thank you for the opportunity to provide the attached proposal for the City of Brisbane. The Energy Coalition (TEC) understands the goals and objectives stated in this RFP and looks forward to an opportunity to assist the City in implementing the Brisbane Building Efficiency Program and supporting compliance for building owners in the community.

TEC brings vast experience in identifying, designing, and implementing community-based energy programs and services. Having successfully written and advised Brisbane on the Building Efficiency Program ordinance, we are eager to implement the shared vision of meeting the City's climate goals through benchmarking and audit compliance. As the State's prime contractor for marketing and outreach related to the California Building Energy Benchmarking Program (AB 802), TEC conveyed compliance requirements to thousands of stakeholders across 36,000 buildings and 4.5 billion square feet of disclosable buildings. TEC has also spurred action from benchmarking and audits for over 130 public agencies, all four California Investor Owned Utilities, the California Energy Commission (CEC), numerous industry professionals and organizations, and statewide education institutions. By partnering with Maalka to develop the City's infrastructure and web portal, we will deliver modern, easy to use, and automated processes to manage the ordinance. These solutions have been used in Chicago and by public and private sector clients throughout the United States.

With a staff of over 60 throughout California, including a nearby office in Oakland, TEC is well-positioned to provide local and comprehensive solutions for the communities we serve. This proposal reflects a customized solution for Brisbane based on TEC's extensive experience working with local communities and offers a cost-effective strategy to administer a new energy benchmarking ordinance that complies with AB 802 requirements while addressing the unique needs of the City.

This proposal outlines TEC's qualifications and expertise in the energy market, including energy efficiency and conservation, water/wastewater, renewables, electric infrastructure, and transportation. It describes a collaborative process with the City to develop and communicate this ordinance. We believe we have the experience and qualifications to support the City of Brisbane to implement the Building Efficiency Program effectively. We agree to the proposed scope of services, terms, and conditions, and we look forward to the opportunity to present more information and answer any questions you may have.

Please contact Marc Costa at 949-732-1078 or [mcosta@energycoalition.org](mailto:mcosta@energycoalition.org) for any inquiries.

Sincerely,



Craig Perkins, President and Executive Director  
The Energy Coalition, 47 Discovery, Suite 250, Irvine, CA 92618



## B. Scope of Work

### BAAQMD Deliverable #2.3 Develop Web Portal / Task 2.3.1 - Develop City Infrastructure

To manage the launch and administration of the adopted ordinance, TEC and its subcontractor, Maalka, will deliver all city infrastructure needed for both the benchmarking and audit requirements. This process will occur in two phases: the first phase is to develop the requirements, datasets, and software infrastructure, and the second phase is to test and refine the infrastructure during the early compliance pilot. This process will ensure the City receives the necessary deliverables and training to operate the ordinance after our team completes the scope of work. First, our team will review the ordinance requirements with the City and define expectations of compliance in year one and subsequent years. Based on TEC's experience, cities have exercised flexibility with building owners in the early years of ordinance compliance and evolved the enforcement in subsequent years. Critical activities in this deliverable include engaging the Environmental Protection Agency (EPA) on ENERGY STAR Portfolio Manager (ESPM) reporting infrastructure and working with the CEC to verify that ESPM reporting fields and deadlines align with statewide requirements. Our team will prepare the software infrastructure for the ordinance audit requirements. Finally, our team will coordinate with the Department of Energy and the Pacific Northwest National Laboratory (PNNL) on Asset Score and Audit Collection Tools.

Unlocking technical assistance capabilities is crucial to increase compliance and customer satisfaction. Our team will coordinate a data release form for tenants with PG&E and generate a compliance checklist for owners. We will align the details of the compliance building owners' requirements with neighboring cities to reduce the complexity of navigating different compliance requirements. Automation, especially of the audit requirements, using DOE and Maalka software will alleviate the administrative burden for Brisbane. Setting up both benchmarking and audit infrastructure in advance will enable the City to use BAAQMD funds to their full extent while our team is on contract.

#### **Deliverables:**

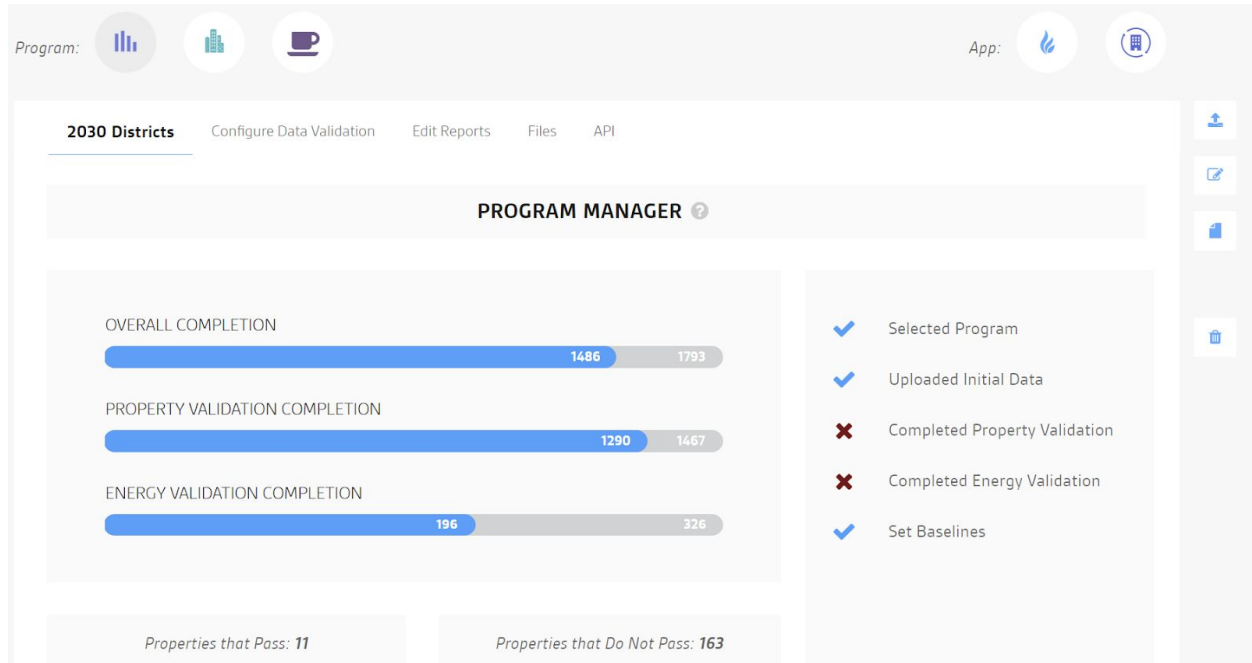
- URLs to Portfolio Manager report template
- Asset Score and Audit Template links for BBEP reporting

### BAAQMD Deliverable #2.3 Develop Web Portal - Task 2.3.2 - Develop Web Portal

An easy to navigate and aesthetically pleasing web portal significantly reduces customer confusion and signals Brisbane is a leader in a new generation of benchmarking and audit ordinances. The first step is to review best practices from other cities' portals and to define the requirements and user experience wireframe for Brisbane's portal. The portal can be hosted on the City's website or through Maalka. Our team has created numerous web portals for local governments, including the Clean Power Alliance, which is the country's largest community choice aggregation program. After the wireframe is approved, our team will gather and generate content for the portal, leveraging the thorough documentation and resources we have already developed for the CEC's benchmarking program. This quick-start approach will allow the City and our team to focus on thoughtful messaging and content instead of basic formatting and layout. Through TEC's regulatory experience with the California Public Utilities Commission, we will create easy to navigate resources for BayREN, PG&E, and Peninsula Clean Energy programs alongside specific measures that align with the audit compliance pathways.

Owners may not understand where to start with compliance. To address this, our team will develop a personalized compliance checklist providing a roadmap for each disclosable property. Each owner will have a guide outlining whether they have to benchmark and perform an audit or an asset score.

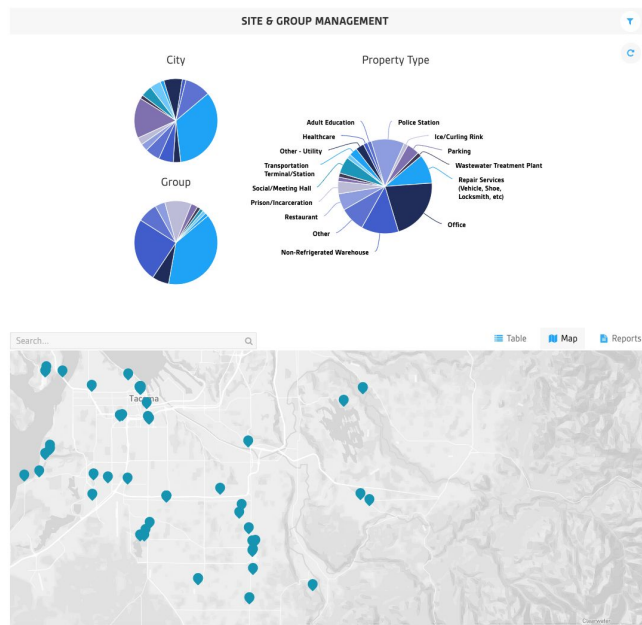
Our team proposes housing compliance checklists and other resources on the city portal that integrates marketing, outreach, education and compliance administration in one system.



\* Data Quality and Compliance Report Sample (Tracks energy/water/site data anomalies across Program)

\*\* Generated on a weekly basis from ESPM Report Upload

This system can be offered via the Maalka platform, the DOE's Standard Energy Efficiency Database Platform, or Salesforce integrations.



Salesforce functions as a customer relationship management (CRM) tool and can integrate with MailChimp email marketing and Zoom screen sharing for seamless outreach and compliance notice tracking. All of these features can be delivered within the available budget, and the level of integration can be customized to align with the City's anticipated budget for ongoing management of their ordinance portal and infrastructure. Leveraging TEC and Maalka's GIS strengths with ArcGIS, we will create automated public and private data and visualization feeds, which can be used to manage and promote the success of the programs. Data and visualization feeds will be designed so that the City can manage them after our team trains City staff.

\* Customizable Filters, Data Report Outputs, and Map-based Visualizations

**Deliverables:**

- URL for finalized and fully-operational web portal
- Compliance Checklist Roadmaps

## BAAQMD Deliverable #2.4 / Task 2.4 - Conduct Staff Training on Web Portal

The Energy Coalition understands the importance of a robust yet easily digestible in-person web portal training for City staff. The team will prepare a step-by-step presentation and training guides, including an overview of benchmarking and auditing a building, submitting a report, and pulling data from ESPM, to ensure that the web portal can be maintained by City staff. Since City staff will need to communicate features of the portal to those submitting compliance data, the training guide will incorporate a script explaining common features of the portal, useful tips and tricks, and troubleshooting topics. Zoom screen sharing is the most useful tool available for providing compliance technical assistance and portal guidance to building owners. Thus, TEC recommends the City uses Zoom and will incorporate training for City staff on this tool.

Some of the biggest challenges City staff face during compliance are sifting through extensive and diverse types of data. Our team will ensure both the presentation and guide include techniques for evaluating benchmarking and audit compliance; this will include a demonstration on populating and updating public-facing features of compliance data. Finally, the presentation and guide will detail the process of compiling and submitting data to share compliance reports with the CEC. A copy of all resources will be made available for any City staff who are not able to attend the in-person training. Additionally, our team will provide language that the City can distribute through internal channels informing staff of program resources and updates.

### **Deliverables:**

- Training materials, including user's manual/guide for managing the web portal
- Agenda, notes, recording, and list of participants
- Delivery and sign-off of in-person training

## BAAQMD Phase 2 Deliverable #2.5 / Task 2.5 - Conduct Education and Outreach

Engaging internal and external stakeholders during the launch and implementation phase of the program will be critical to its strong start and long-term success. Once internal program overviews and introductory trainings have been completed, external stakeholders will need to be engaged. TEC will approach this process by first refreshing market analysis to best understand the building stock and any changes in Brisbane. Then, TEC will update its existing contact list to ensure as many building owners and other stakeholders as possible are captured during engagement. To capture the broadest audience possible, TEC will develop surveys to gauge availability and interest for in-person and online training. Surveys will also help to determine which assistance materials would be most beneficial. While collecting information on stakeholders and buildings, TEC will simultaneously begin the development of educational content for sharing with stakeholders and for posting on the portal. This content includes an FAQ document that will be updated based on common questions throughout engagement, a troubleshooting form, a program introduction, and a compliance flowchart. Additional resources we will develop include one-pagers, fact sheets, webinar slides, compliance manuals, measure and rebate lists, support call scripts, and helpful tips and tricks for compliance.

TEC recommends an initial event for all stakeholders is hosted at City Hall as a ceremonial launch for the program. The all-stakeholder launch will then be followed by two in-person comprehensive ESPM trainings on topics such as requesting data, gathering building data, inputting to ESPM, quality checking data, submitting data, troubleshooting common issues, and popular tips and tricks. Where appropriate, TEC will invite guest speakers such as engineers or Pacific Northwest National Laboratory (PNNL) staff to share case studies and best practices. In-person events will be supplemented by at least two online training events, including one webinar for building owners, property managers, and leasing companies, and another webinar for engineers and consultants to understand technical requirements. TEC will also be available for one-on-one phone support for building owners and will train staff to become experts at troubleshooting compliance assistance needs via the Zoom platform. As part of the audit training, TEC will partner with PNNL and voluntary practitioners to host an audit demonstration event with the Chamber of Commerce to demystify the

audit compliance process and showcase the web portal and resources. A survey will be distributed after each event to gauge effectiveness and to understand any remaining needs.

**Deliverables:**

- List of ways information on web portal has been communicated to City staff
- For all trainings and webinars: agendas, presentations and other materials, participant list
- For audit demonstration event: promotional announcements or materials, video or photos of the event, list of participants

**BAAQMD Phase 2 Deliverable #2.5: Conduct Education & Outreach Task 2.5.1 - Voluntary Pilot Benchmarking**

A voluntary benchmarking pilot is immensely helpful to ensure a smooth launch and implementation of the program. By engaging a smaller sample of building owners that reflect every size building and compliance scenario, the City can fully test their infrastructure to ensure self-sufficient delivery of the program after BAAQMD funds are exhausted. Connecting building owners with resources on the web portal will help spur action and energy savings, which is the overall intent of the ordinance.

TEC will work with the City to identify goals and priorities for the pilot and make recommendations about who should be included and what compliance metrics to track (number of buildings, percent of square footage, etc.). TEC recommends that all building types are included in the pilot (commercial, industrial, multifamily, and city facilities) to identify gaps in infrastructure development early and to demonstrate leadership. The City may consider including a small number of building owners seeking exemptions in the pilot to test those processes, as well. Early compliers can gain recognition through case studies based on their testimonials and experience, and case studies also serve as a valuable educational tool for compliers following launch. Early compliers will also receive Energy and Water Benchmarking Performance Reports that will help them understand their progress towards City and State performance targets.



\*Sample Performance Report Plot showing progress towards baselines and targets over time

\*\* Baselines and targets can be fully customizable and can be incorporated into the Portal

TEC will develop a structure for tracking early complier feedback, which will help shape the program’s educational materials and training content. TEC will work with the City to develop a benchmarking pilot scope and timeline that can serve as a model for a future auditing phase pilot before the auditing deadline.

**Deliverables:**



- Early compliance dataset
- Testimonials from building owners and stakeholders in the pilot
- Early compliance reports and results for web portal

### BAAQMD Phase 2 Deliverable #3.1 - Task 3.1 - Produce Ordinance “Toolkit”

A comprehensive toolkit will ensure Brisbane’s ordinance has an opportunity to grow and magnify in impact. TEC understands the tremendous value of having this ordinance be both replicable and scalable so that local governments of all sizes and varieties can adopt their own version and contribute to water and energy use reductions. This toolkit will make the implementation of progressive benchmarking and auditing ordinance less intimidating, and ideally will foster region-wide development of similar ordinances and cost-sharing of infrastructure. Our team will design the toolkit specific to California local governments and further customize it for neighboring cities to ensure it is accessible and implementable for them.

TEC is prepared to quickly and efficiently develop this toolkit of best practices and templates based on the support we provided through phase one development of the ordinance and engagement to stakeholders. Our team will assemble all necessary templates for the toolkit, including the ordinance framework and materials to support communication (one-pager for City staff, a script for one-on-one discussions with stakeholders, and presentations with flowcharts). Additionally, TEC will compile all relevant stakeholder engagement and planning templates for the toolkit, including a stakeholder identification and prioritization mapping activity, engagement and outreach planning document, and all presentations, agendas, and outlines for workshops and working group engagement with stakeholders. TEC will also incorporate best practices tools to increase the appeal for local governments to adopt such an ordinance. These best practices tools include a summary of feedback received from all stakeholder engagement, guides on how to structure outreach to encourage online and in-person attendance, and tips on incorporating flexibility and continual feedback for improvement during launch and implementation of the program.

#### Deliverables:

- Ordinance toolkit
- URL for the online version of the toolkit

## C. Project Team

TEC is a nonprofit 501(c)3 organization with over 45 years of experience empowering communities to leap into the future of clean energy. Moreover, TEC and its subconsultant, Maalka, have worked together on various DOE advisory groups and over the past two years have partnered on California projects to deliver benchmarking and audit portfolio management to public sector clients. All team resumes are included in the Appendix.

#### Marc Costa, Director

Marc has more than ten years of experience in the building industry focusing on areas ranging from advanced energy community planning, federal energy data standards and software development to state and local government energy policy. Marc is a board member of the Local Government Sustainable Energy Coalition and Policy Advisory Committee with the California Technical Forum. He holds a B.S. in Management Science from UCSD, a B.S. in Construction Engineering from CSULB, and is a LEED AP, CGBP, and BOC Level II.

#### Ivana Dorin, Program Manager

Ivana manages engagement, education, and outreach activities for TEC and its programs. She has over eight years of experience serving the energy needs of communities, supporting local governments with energy strategic planning, and the rollout of benchmarking requirements to IOU Local Government Partnerships. She holds a B.A. in Environmental Policy from UCSD and an M.A. in Environmental Policy from Colorado State University.

### **Jake Anderson, Project Manager**

Jake manages various aspects of the North Orange County Cities Local Government Partnership Program at TEC, including the development of a benchmarking workshop for partnership cities. Jake holds a B.S. in Earth and Environmental Science with a minor in Global Sustainability from UCI.

### **Christina Caddel, Project Manager**

Christina provides analytical support across programs in The Energy Coalition's portfolio, working with various partners in obtaining, wrangling, and analyzing data, and then presenting the outcome of analysis to stakeholders. She previously worked for VaynerMedia as a Data Analyst and holds a B.S. in International Business with a minor in Cultural Anthropology.

## **Maalka**

Maalka was born from years of closely collaborating with internationally-recognized leaders in sustainability, energy, and commercial real estate. Open, secure, scalable, and workflow-oriented, the Maalka Platform is enabling cities and organizations around the world to deploy data-driven programs that align with proven frameworks developed by industry leaders. Maalka technology makes data-driven program management easy and affordable for everyone.

### **Dr. Rimas Gulbinas, Maalka Co-Founder & CEO**

As Chief Executive Officer at Maalka, Dr. Gulbinas is responsible for business development, sales, partnership engagement, project management, technical algorithm formulation, and working directly with industry leaders to ensure the alignment of Maalka development with emerging market trends. Prior to Maalka, Rimas received his Ph.D. at Virginia Tech and as a Via Fellow conducted research to understand how data can be leveraged to drive energy efficiency through positive behavior change.

## **D. Relevant Experience**

TEC and Maalka are pleased to provide the following summaries of experiences. Relevant work samples are included in the Appendix.

### **Brisbane Building Efficiency Program (2019)**

TEC was selected to support the development of the Brisbane Building Efficiency Program (Phase I) and helped to build the Program. TEC drafted a progressive benchmarking and auditing ordinance covering energy and water and incorporating stakeholder engagement at each milestone of the ordinance development. Maalka provided energy modeling support for buildings impacted by the ordinance to kick-start compliance on the recently passed ordinance.

### **California Energy Commission, AB 802 Outreach and Facilitation (2017 - 2019)**

As part of the California Energy Commission's AB 802 outreach and facilitation efforts, TEC led an implementation team that developed educational resources, collateral, webinars, a help center, and market analysis for building owners and stakeholders required to comply with California energy benchmarking mandates. A key part of TEC's role on this project was identifying buildings statewide that need to comply with benchmarking mandates.

### **Southern California Regional Energy Network (2013 - Present)**

TEC designed and is implementing The Southern California Regional Energy Network (SoCalREN) Public Agency Programs which, at no cost to agencies, identify energy-saving measures and work side-by-side with agency staff from building benchmarking through construction to accomplish energy efficiency projects. Services include start-to-finish project management support, portfolio-wide comparative energy analysis, benchmarking services leveraging Energy Star Portfolio Manager, technical assistance, access to financing, competitively bid specialty contractors, and transparent pricing and assistance with utility rebate processing. Currently, SoCalREN serves over 130 agencies.

### Clean Power Alliance of Southern California (2018 - 2019)

The Clean Power Alliance of Southern California, or Clean Power Alliance, is the largest community choice aggregation program in the United States. TEC provided all marketing and outreach services for the launch of Clean Power Alliance. In this project, TEC conducted a full marketing campaign including brand and style development, development of a communications plan, website creation, customer notification and engagement collateral, social media, member agency communications coordination, and more. The overall campaign sought to inform and educate customers about the benefits of Clean Power Alliance.

### Program Name: PEAK Student Energy Actions (1975 - Present)

TEC is the designer and statewide implementer of PEAK, a workforce education and training program within the IOU Connections portfolio. PEAK is a comprehensive, standards-based environmental education program that empowers students to effectively and wisely manage their energy future. PEAK promotes energy efficiency, demand response, water conservation, renewable resources, environmental stewardship, greenhouse gas emissions reduction, and careers in sustainability. In partnership with all four IOUs (SCE, SCG, PG&E, SDG&E) and municipal utilities (LADWP, APU, SMUD), TEC serves over thirty thousand students and their educators each year.

## Subconsultant (Maalka) Experience

### City of Chicago Benchmarking QAQC (2017-2020)

Maalka worked with the City of Chicago to automate the processes of data import and compliance validation for over 3,000 buildings that report data to the city for its 2016-2017 Energy Benchmarking initiative. Maalka developed CSV-based data import/export workflows leveraging BEDES mappings to seamlessly import benchmarking data validation results into Salesforce for distribution to benchmarking program participants. The process allows Chicago to update data each week and track compliance/energy trends for all the buildings in the Benchmarking Ordinance.

### California Energy Commission, Prop 39 Dashboard

Maalka integrated data across four disparate sources and formats into a highly intuitive, secure, and scalable platform that allows the CEC to track energy performance, energy efficiency measure implementation, and project costs across the state. Maalka developed CSV, XML, and JSON data ETL methods to integrate over 350 million data points across disparate data records into custom building and portfolio-level data visualizations and analytics for tracking efficiency measures and energy data across over 3,000 schools.

## E. Project Timeline and Budget

Task	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
2.2 Kick-off Meeting	█								
2.3.1 Develop City Infrastructure*		█	█				█		
2.3.2 Draft Web Portal Design For City Review			█	█					
2.4 Conduct Staff Training on Web Portal				█					
2.5.1 Voluntary Pilot Benchmarking				█	█	█			
2.3.3 Final Web Portal and City Staff Training					█	█	█		
2.5.2 Conduct Education and Outreach						█	█	█	

3.1 Produce Ordinance "Toolkit"									
4.0 Monitor Outcomes and Results**									

\*City infrastructure will be developed by May 2020 and will be further updated and refined after the conclusion of the Voluntary Pilot Benchmarking.

\*\*Outcomes and results will be based on the Voluntary Pilot Benchmarking

TEC is requesting a total of \$99,000 to complete the proposed work, with \$30,000 from fees for software and city infrastructure and \$13,000 in the form of expenses related to printing materials, travel to meetings, and hosting community workshops. Fees represent TEC's indirect costs, such as overhead and administration. The tables below show a breakdown of the budget per task and the estimated labor hours for each task.

	Labor	Fees	Expenses	Task Total
2.2 Convene Kickoff Mtg	\$6,000	\$0	\$1,000	\$7,000
2.3 Develop Web Portal	\$5,000	\$15,000	\$0	\$20,000
2.4 Staff Training on Web Portal	\$6,000	\$5,000	\$1,000	\$12,000
2.5 Education & Outreach	\$25,000	\$5,000	\$5,000	\$35,000
3.1 Ordinance Toolkit	\$9,000	\$0	\$4,000	\$15,000
3.2 Promotion of Ordinance to LGs	\$3,000	\$2,000	\$2,000	\$5,000
4 Monitor Outcomes & Results	\$2,000	\$3,000	\$0	\$5,000
<b>Total</b>	<b>\$56,000</b>	<b>\$30,000</b>	<b>\$13,000</b>	<b>\$99,000</b>

Proposed Staff	Estimated Labor Hours	2.2	2.3	2.4	2.5	3.1	3.2	4
Marc Costa	100	10.60	8.83	10.60	44.15	15.89	5.30	3.53
Ivana Dorin	125	13.25	11.04	13.25	55.19	19.87	6.62	4.42
Jake Anderson	65	6.89	5.74	6.89	28.70	10.33	3.44	2.30
Christina Caddel	65	6.89	5.74	6.89	28.70	10.33	3.44	2.30
<b>TOTAL</b>	<b>355</b>	<b>37.62</b>	<b>31.35</b>	<b>37.62</b>	<b>156.73</b>	<b>56.42</b>	<b>18.81</b>	<b>12.54</b>



**MARC COSTA,**  
**LEED AP BD+C, CGBP, BOC II**  
Director of Policy & Planning

**Education**

California State University, Long Beach  
Bachelor of Science in Construction Engineering Management

University of California, San Diego  
Bachelor of Science in Management Science

**Publications, Presentations & Awards**

- SEEC Forum, Benchmarking Programs (2017, 2018)
- Veteran's Energy Seminar, Emerging Trends in Energy Workforce (2018)
- MGBCE, California Statewide Building Energy Program (2016, 2017)
- ACEEE Summer Study, National Framework for Benchmarking & Audit Ordinances (2016)
- ACEEE Summer Study, Unlocking the Power.. (2014)
- USGBC, MGBCE Presentation (2014)
- DOE Better Buildings Challenge Judge (2014)
- Saddleback College, Guest Lecturer (2013)
- USGBC-LA Green Gala, Chapter Success Remarks (2012)

**Accreditations, Credentials, and Memberships**

- CAEECC - Member; Market Transformation Working Group
- CalTF - Energy Modeling Working Group
- CEC - Benchmarking Data Alignment Work Group
- Linux Foundation Energy - Open Source Energy Software
- LBNL - SEED/BEDES Development TF
- DOE Asset Score - Data Intake Work Group
- CABEC - Member
- USGBC - Center for Green Schools, National Chair
- USGBC - Pacific Regional Cmte Secretary
- USGBC-LA Board of Directors Treasurer
- Building Operator Certification Level II
- CGBP - Build it Green
- OSHA 10 Construction Safety Certification
- LEED AP BD+C
- San Diego Employers Assoc., Supervisory Skills Cert.



**Professional Experience**

**The Energy Coalition**  
Director

**Jul. 2017 - Present**  
Irvine, CA

- Develop regulatory and policy guidance on decarbonization, energy efficiency, demand flexibility, renewables, GHG reductions integrated grid resource planning, etc. in California
- Lead the California Energy Commission Statewide Building Energy Benchmarking Program contract and serves as a technical strategist on data driven outreach and compliance monitoring
- Subject matter expert to the Department of Energy, Building Technologies Office, Solar Energy Technology Office and various national labs on strategic road-map development, grant funding selection and commercialization of software and standards related to building energy modeling (BEM), Grid-Interconnected Efficient Buildings (GEBs), Model Predictive Controls (MPCs), and Automated Fault Detection and Diagnosis (AFDD)
- Lead the implementation of CEC EPIC grants related to energy master planning and renewable energy system sizing and program design for Disadvantaged Communities and Indoor Air Quality contracts
- Lead local government projects related to benchmarking and audit ordinance development and implementation, including in Brisbane, CA
- Founder of the Linux Foundation Energy group on energy education and open source energy modeling software

**Program Manager**

**Irvine, CA**

- Generated, commented, submitted and filed regulatory and legislative comments in CPUC and CEC Proceedings; Contributed comments to regulatory proceedings on data, C&S, and Regulatory Matters; Served as subject matter expert on Federal resources on policy and tools
- Managed design and implementation of software and database (Energy Atlas) tools; worked with partners to create and deploy infrastructure for energy management resources

**Project Manager**

**Irvine, CA**

- Managed projects for the Community Energy Partnership and HVAC Quality Installation Pilot Program

**Long Beach City College**

**Feb. 2010 - Jul. 2011**

**Presenter**

**Long Beach, CA**

- Served as a key contact between LBCC, training agencies, nonprofits, and municipalities to develop the largest green job training and placement program in the nation

**Long Beach Aquarium of the Pacific 2009 - 2010**

**LEED Fundamental Commissioning Agent Long Beach, CA**

- Compiled and drafted versions of Owner's Project Requirements for LEED Platinum Certification of the Molina Animal Care Center
- Field visits and commissioning reports for MEP systems, TAB reports, functional testing, and training manual

**Dixieline Lumber Corporation**

**2004 - 2007**

**Retail Sales Supervisor**

**Long Beach, CA**

- Supervised, trained, and evaluated team of employees in customer service and professional value-added sales

**Expertise**

A nationally recognized subject matter expert on energy policy, federal energy analysis tools and data standards. Serves as an in-house and industry wide resource on how data informs decarbonization policy and on-the-ground market transformation.

# IVANA DORIN

## Program Manager

### Education

#### Colorado State University, 2009

Master of Arts in Political Science, emphasis on environmental politics and policy and American government

#### University of California San Diego, 2006

Bachelor of Arts in Environmental Politics

### Expertise

- Stakeholder Engagement/Public Participation
- Qualitative Research Methodologies (Surveys, Interviews, Focus Groups, Case Studies, etc.)
- Interactive and engaging event development

### Certifications

- Leed Green Associate, 2013  
Professional credentials for green building principles and practices

### Associations and Community Involvement

- Association of Women in Water, Energy, and the Environment - Orange County/ Inland Empire Regional Team Leader (January 2012 - Present)
- Community Emergency Response Team - City of Irvine Member, Irvine, CA (September 2012 - Present)
- Coalition for Clean Air - Summer Intern, Los Angeles, CA (June 2010 - September 2010)
- Environment Now Foundation - Contract Researcher/Writer, Santa Monica, CA (October 2009 - February 2010)



## Professional Experience

### The Energy Coalition Program Manager

Nov. 2011 - Present  
Irvine, CA

- Manages various contracts and associated budgets, deliverables, and planning
- Serves as a liaison for a range of clients and partners including utilities, public agencies, and private companies
- Specializes in stakeholder and public engagement strategies for public agency projects
- Develops outreach projects related to energy behavior change strategies
- Applies qualitative research methodologies to assess program impact

### Colorado State University Graduate Teaching Assistant

Aug. 2007 - May 2009  
Fort Collins, CO

- Assisted professors in conducting undergraduate level lectures in American and Comparative Politics
- Developed content and lectured classes of 100-200 students on topics in U.S. foreign and social policy
- Composed and graded exams and essays and conducted study review sessions
- Held regular office hours for individual assistance to students
- Managed administrative office tasks for the department as needed

### Environment Now Sustainability Program Intern

May 2008 - Aug. 2008  
Irvine, CA

- Researched potential grant projects and partner organizations
- Summarized research projects on urban sustainability issues
- Produced reports and comprehensive PowerPoint presentation for staff
- Collaborated with community leaders, non-profit organizations, and government to advance urban sustainability
- Coordinated Environment Nows 2nd Annual Top Achievements Report Awards Luncheon

### Canyon Policy Project Policy Analyst

Sep. 2006 - Jun. 2007  
San Diego, CA

- Conducted research and evaluation of the city of San Diego's environmental policies and practices
- Produced multivolume community reports on the Multiple Species Conservation Program (MSCP)
- Evaluated stakeholder involvement and equity in San Diego environmental policymaking
- Participated in city meetings and working groups to discuss local policy making practices
- Interviewed federal, state, and city employees for MSCP research

### Skills

- Salesforce CRM
- Zoom Meetings & Webinars
- MailCamp
- Microsoft Office Suite
- Google Suite

# JAKE ANDERSON

Project Manager

## Education

University of California, Irvine, 2014  
Bachelor of Science in Earth and Environmental Science; Minor in Global Sustainability; Magna Cum Laude; Certificate in Environmental Sustainability

## Expertise

Sustainability specialist skilled in project management. Strategic thinker and innovative problem solver. Ability to track, report, and analyze data for actionable insight. Highly organized self-starter. Adaptable to collaborate in diverse environments.

## Skills

- ENERGY STAR Portfolio Manager®
- IOU Benchmarking Web Services
- Building Performance Database (BPD)
- Salesforce CRM
- Insightly CRM
- MailChimp
- Canva
- Microsoft Office Suite
- Google Suite

## Professional Experience

### The Energy Coalition Project Manager

Aug. 2015 - Present  
Irvine, CA

- Oversee operations of the North Orange County Cities Energy Partnership with an emphasis on maintaining relations and customer satisfaction with municipal and utility partners
- Assist municipal partners in identifying and tracking municipal energy efficiency projects to meet city and partnership goals resulting in cumulative electricity savings of 2.4M kWh
- Develop and implement multi-year project for partnership-wide facility benchmarking utilizing ENERGY STAR Portfolio Manager® for over 180 facilities; Assist cities with compliance of California Building Energy Benchmarking Program
- Support municipal partners with development of Energy Action Plans and educational outreach presentations and collateral for internal city staff, city council, and community residents
- Recognize municipal partner achievements through development of award applications for Cool Planet Program and Beacon Program, resulting in over 10 awards received by partners
- Support contracts for state and local municipal energy benchmarking policy outreach through marketing campaigns, educational workshops, and collateral development

### FirstCarbon Solutions Sustainability Consultant

Jul. 2014 - Aug. 2015  
Irvine, CA

- Prepared project budgets and Gantt/RASCI charts for internal and customer use
- Scheduled and led customer status meetings
- Created project dashboard and weekly billing calculator; Tracked team billing on regular basis
- Established cadence for client status updates and process for submitting inquiries
- Developed data collection system and managed data acquisition from client for project deliverables
- Conducted over 140 CDP score feedback calls with company representatives
- Led efforts in CDP, DJSI, and EcoVadis questionnaire improvements using sustainability reporting methodologies
- Drafted customer deliverables including energy audit and reduction target reports, CDP scoring analysis reports, water risk analysis reports, and energy rebate research
- Trained new team members in drafting and managing project deliverables

## Certifications & Speaking Events

- Panelist at 2019 Municipal Green Building Conference & Expo
- Panelist at 2017 Statewide Energy Efficiency Collaborative Forum
- U.S. Green Building Council, LEED Green Associate

# CHRISTINA CADDEL

Project Manager

## Education

### University of San Francisco

Bachelor of Science in International Business and Cultural Anthropology

**Continuing Education:** Udacity Data Analysis and Data Foundations, Coursera Math for Data Science and Excel for Data Analysis

**Study abroad:** Università Cattolica Del Sacro Cuore, Milan, Italy

## Expertise

Motivated Data Analyst with a proven track record in problem-solving, investigating underlying issues, and yielding actionable insights to help companies make data-driven decisions, powering growth and success.

## Skills

- Data Wrangling and Analysis
- Data Visualization
- Quantitative Analysis
- Reporting
- Business Analytics
- Data Quality Assessment
- Process Improvements
- ETL
- BI
- Statistics
- Documentation
- Microsoft Office
- Relational Databases
- Python
- SQL
- R
- Tableau
- Data Studio
- Google Apps
- Salesforce



## Professional Experience

### The Energy Coalition

Program Analyst

Sep. 2019 - Present

Irvine, CA

- Clean and wrangle data sets from various sources, writing custom programs to ensure data quality
- Serve as a company-wide resource for TEC, conducting research as instructed and presenting findings to internal staff, creating data collection, entry and analysis best practices across programs

### VaynerMedia

Data Analyst

Sep. 2018 - Sep. 2019

Los Angeles, CA

- Executed data analysis process; cleaned and standardized disparate large data sets, populating dashboards for analyzing data of campaign performance, with findings and recommendations to maximize success
- Transformed metrics reporting to curated data storytelling dashboards, expanding client utilization of reports
- Instituted data governance and best practices, wrote parsing logic for data collection, and enhanced data quality to ensure accuracy, producing actionable insights
- Built data-driven attribution comparison visualization with Markov vs. heuristic modeling using R coding to use in client pitch presentations, earning \$7M in new business

### Udacity

Data Analysis Student

Mentor and Project Reviewer

Feb. 2018 - Sep. 2018

Los Angeles, CA

- Measured students' analytical thinking, writing skills, technical and database understanding in their project submissions, determined achievement of analytical standards, and provided constructive feedback
- Mentored 45 students simultaneously, providing advice and guidance to maximize learning experience

### Mr. Holmes Bakehouse

HR Manager

May 2015 - Jul. 2017

Los Angeles, CA

- Built and managed HR Department in fast-paced environment, instituted business operations strategic initiatives while managing payroll, financial performance, and vendors as company quadrupled in size
- Developed data management processes with which to analyze workforce trends and make decisions
- Achieved heightened employee morale, steep compliance risk reductions, and increased analytical decision making for internal stakeholders and leadership, saving the company \$60K annually

### JAQET

Project Manager

Jan. 2014 - Jan. 2015

Los Angeles, CA

- Analyzed Ecommerce performance with Google Analytics and conducted research to design strategic planning for marketing initiatives and managed their implementation, increasing brand exposure by 20%
- Implemented targeted, effective marketing communications that increased funnel conversions

## Affiliations

- Data Camp Data Analysis in Python
- Google Analytics

*Rimas Gulbinas, Chief Executive Officer, Maalka*

Education and Training

**Jacobs Cornell Technion Innovation Institute, New York, 2015**

Runway Postdoctoral Fellow, *Focus: Urban Scale Building Efficiency*

**Virginia Polytechnic Institute and State University, Virginia, 2014**

PhD in Civil Engineering, *Focus: Commercial Building Energy Efficiency*

**Columbia University, New York, 2011**

MSc in Mechanical Engineering, *Focus: Energy Systems*

Professional Experience

**Maalka, Chief Executive Officer (Sept. 2014 - Present)**

- Lead business and sales development for Maalka platform to service emerging city sustainability, sensing and benchmarking initiatives
- Lead public and private partner engagement and project management efforts
- Support technical development of open applications for benchmarking buildings, portfolio-level building performance analysis, and data analytics

**Department of Energy, Building Innovation Fellow (2014 - Present)**

- Transitioning leading building analytics research into market products
- Engaging with DoE National Lab networks to drive research on building occupancy

**Virginia Polytechnic Institute and State University, Blacksburg, VA (2011-2014)**

- Conducted award-winning research on maximizing energy efficiency of commercial buildings through the data-driven empowerment of building occupants
- Managed commercial building energy efficiency studies in Denver, CO, New York, NY and Portland, OR

**Columbia University, New York, NY (2010-2011)**

- Teaching Assistant (Energy Infrastructure Planning, Mechanics of Propulsion)
- Conducted research on Multifamily Residential Eco-Feedback Systems

Select Publications

- **Gulbinas, R.**, Khosrowpour, A., Taylor, J. (2015). "Segmentation and Classification of Commercial Building Occupants by Energy-Use Efficiency and Predictability," *IEEE Transactions on Smart Grid*.
- **Gulbinas, R.**, Jain, R., Taylor, J., Peschiera, G., Siegel, J., and Golparvar-Fard, M. (2013). "Network Eco-Informatics: Development of a Social Eco-Feedback System to Drive Energy Efficiency in Residential Buildings." *Journal of Computing in Civil Engineering*, 10.1061: 1943-5487.
- **Gulbinas, R.**, Jain, R., and Taylor, J. (2014). "BizWatts: A Modular Socio-technical Energy Management System for Empowering Commercial Building Occupants to Conserve Energy." *Applied Energy*, 136: 1076-1084.
- **Gulbinas, R.** and Taylor, J. (2014). "Effects of Real-time Eco-feedback and Organizational Network Dynamics on Energy Efficient Behavior in Commercial Buildings," *Energy and Buildings*, 84: 493-500.
- Jain, R., **Gulbinas, R.**, Taylor, J., and Culligan, P. (2013). "Can social influence drive energy savings? Detecting the impact of social influence on the energy consumption behavior of networked users exposed to normative eco-feedback," *Energy and Buildings*, 66: 119-127.

# Benchmarking Resource Guide

The document provides a high-level overview of the benchmarking process and points you to additional resources and instructions for step-by-step guidance. Using this guide as a reference, you will understand how to create new property records, add to or edit existing property records, and follow steps to comply with The California Building Energy Benchmarking Program.

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# Accessing Energy Star Portfolio Manager Online

## Accessing Energy Star Portfolio Manager (ESPM) Online

Your city should already have a registered ESPM account that contains your benchmarking data. If you need to create a new account, we suggest sharing all existing property records with the new account (see section on sharing property records between accounts).

[Log-in here](#)<sup>1</sup>

[Create new account here](#)<sup>2</sup>

See instructions below on creating a new account:

### RESOURCE 1: Creating an ESPM Account

#### HELPFUL HINTS:

1. Use the '**Benchmarking Account Credentials**' page to keep track of the city's existing log-in credentials.
2. Share your login credentials with internal staff and make the information accessible to other departments.

---

<sup>1</sup> <https://portfoliomanager.energystar.gov/pm/dataimport/upload>

<sup>2</sup> <https://portfoliomanager.energystar.gov/pm/signup>

# Add/Edit a Property in ESPM:

## Step 1: Collecting Property Information

You will need to add a building to your city's portfolio or update details if:

- A new building was constructed
- A building was previously omitted
- A building's characteristics have changed

Required data points for all property types includes:

- Property Name
- Property Address
- [Year Built/Planned for Construction Completion](#)
- Primary Function
  - Select from property use type [list](#)
- Construction Status
- [Gross Floor Area](#)
- [Occupancy Percentage](#)
- Property Structure
- [Irrigated Area](#)

Optional data points include:

- [Weekly Operating Hours](#)
- [Number of Workers on Main Shift](#)
- [Number of Computer](#)

For definitions of property information terms, visit: [portfoliomanager.energystar.gov/pm/glossary](http://portfoliomanager.energystar.gov/pm/glossary)

Collect data using the spreadsheet:

**RESOURCE 2:** [ESPM Data Collection & Upload Template](#)

### HELPFUL HINT:

We suggest keeping an up-to-date spreadsheet of all properties and updating it periodically.



## Step 2: Add/Edit Property Information in ESPM

Individual properties can be uploaded one at a time but we suggest the “bulk upload” feature to upload multiple properties at once.

[Bulk Upload Landing Page](#)<sup>3</sup>

See instructions below to upload or edit data in ESPM:

**RESOURCE 3: Upload Individual Properties**

## Step 3. Add Meters to Property in ESPM

For each property, you will need to add each energy meter that is serving the property. Meter information can be added under the meter tab for each property.

### *Naming SCE Meters*

- Name the electric meter with the SCE Service Account Number
  - Service Account Number is 13 characters long and can be found on your SCE bill
  - Ex. **3-XXX-XXXX-XX** (include dashes)
- Units for each meter: kilo-watt hour (kWh)
- Enter the date the meter became active (this can be an estimate)

### *Naming SCG Meters*

- Name the gas meter with the SCG Meter Number
  - Meter Number is 8 digits and can be found on your SCG bill
  - Ex. **XXXXXXXX** (no additional text before or after the number)
- Units for each meter: therms
- Enter the date the meter became active (this can be an estimate)

See instructions below on how to add and properly name each type of meter:

**RESOURCE 4: Create Meters in ESPM**

<sup>3</sup> <https://portfoliomanager.energystar.gov/pm/dataimport/upload>

# Automated Utility Data Uploads

SCE and SCG provide 'Web Services' to automatically upload energy consumption data for each property directly to your ESPM records. Once you establish a connection for each meter, the data will flow to your property records and be uploaded monthly.

## Southern California Edison Web Services

### Step 1. Create/Log-in to SCE.com Account

In order to access SCE's automated data connection service, you will need to create or log-in to your SCE.com account. The user of this account does not need to be the owner of the SCE service account.

[Create a new SCE.com account here](#)<sup>4</sup>

[Log-in to existing SCE.com account here](#)<sup>5</sup>

See instructions below on how to create a SCE.com account:

**RESOURCE 5:** Create a SCE.com Account

### HELPFUL HINTS:

1. Use the '**Benchmarking Account Credentials**' page to keep track of the city's existing log-in credentials.
2. Check with your SCE Account Representative if you have questions about logging in to your SCE.com account.

### Step 2. Enter Property/Building Information in SCE.com

Once logged in to SCE.com, upload information for the properties you would like to connect to Web Services. Once you retrieve the 'Data Sharing Key' you can move to Step 3.

See instructions below on how to input information on SCE.com:

**RESOURCE 6:** Enter Property/Building Information in SCE.com

<sup>4</sup> <https://www.sce.com/user-registration>

<sup>5</sup> <https://www.sce.com/business/tools/benchmarking-how-do-i-compare>

### Step 3. Connect ESPM Meter to SCE Web Services

The final step is connecting your ESPM records with SCE. You must first add SCE as a contact and then share the property with SCE using the 'Data Sharing Key.'

See instructions below on how to connect to SCE Web Services:

**RESOURCE 7:** Connect ESPM to SCE Web Services

## SoCalGas Web Services

In order to access SCG's automated data connection service, you will need to have a copy of your most recent bill on hand for the property you are connecting. If unable to reference your last bill, request the last bill amount from your SCG representative.

See instructions below on how to connect to SCG Web Services:

**RESOURCE 8:** Connect ESPM to SCG Web Services

### HELPFUL HINT:

For troubleshooting with set up of SCE and SoCalGas Web Service connections or pauses/delays in automated data uploads, please contact [scgbenchmarking@socalgas.com](mailto:scgbenchmarking@socalgas.com) or [benchmarking@sce.com](mailto:benchmarking@sce.com)

## Sharing Property Information with Others

You have the option to share property records with 3rd party organizations that utilize ESPM. We suggest requesting the specific ESPM username from the 3rd party to ensure you are connected with the proper account.

See instructions below on how to connect with other ESPM users:

**RESOURCE 9:** How to Share Properties with Other Portfolio Manager Users

# California Building Energy Use Benchmarking Program (AB 802 Reporting)

[Assembly Bill 802](#)<sup>6</sup> directed the California Energy Commission (CEC) to create a statewide building energy use benchmarking and public disclosure program for buildings larger than 50,000 square feet.

The [regulations](#)<sup>7</sup> require building owners to report building characteristic information and energy use data to the Commission by **June 1st annually**, beginning in 2018 for buildings at or above 50,000 square feet with no residential utility accounts, and in 2019 for buildings with 17 or more residential utility accounts.

Check for Completeness of Billing Data for Each Meter	Deadline to Submit to CEC	Data Set Submitted
March 2020	June 1, 2020	Jan 1 - Dec 31, 2019
March 2021	June 1, 2021	Jan 1 - Dec 31, 2020
March 2022	June 1, 2022	Jan 1 - Dec 31, 2021
March 2023	June 1, 2023	Jan 1 - Dec 31, 2022
In Perpetuity	In Perpetuity	In Perpetuity

Summarized Steps Include:

- Run **Data Quality Checker** for each property in ESPM
  - Resolve any issues related to energy meters
- Click **Reporting Link** on [CEC Website](#)<sup>8</sup>
- Select your properties **over 50,000 sqft**
  - Refer to the continued benchmarking commitment letter for complete list
- **Submit data** to CEC
  - You will receive a confirmation sent to the email associated with your ESPM account

See instructions below on how to submit data to CEC:

**RESOURCE 10:** AB 802 Benchmarking Compliance Guide  
**RESOURCE 11:** Who is Required to Comply with AB 802

<sup>6</sup> [https://ww2.energy.ca.gov/benchmarking/documents/AB\\_802\\_chapter\\_590.pdf](https://ww2.energy.ca.gov/benchmarking/documents/AB_802_chapter_590.pdf)

<sup>7</sup> <https://efiling.energy.ca.gov/GetDocument.aspx?tn=222916>

<sup>8</sup> <https://www.energy.ca.gov/benchmarking/>

## FREQUENTLY ASKED QUESTIONS

### How do we handle properties with more than one building?

For properties with multiple buildings, first consider if the total aggregated square footage of all buildings is 50,000 square feet or more. If so, non-residential properties are required to comply if all buildings are served under the same utility meter. Residential properties are required to comply if they have 17 or more utility accounts of a single energy type. Portfolio Manager has a feature to benchmark your property as a campus of multiple buildings and establish which meters serve which buildings.

### What if we can't get tenant authorization?

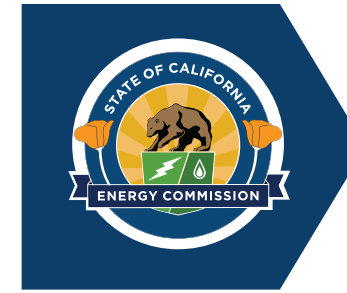
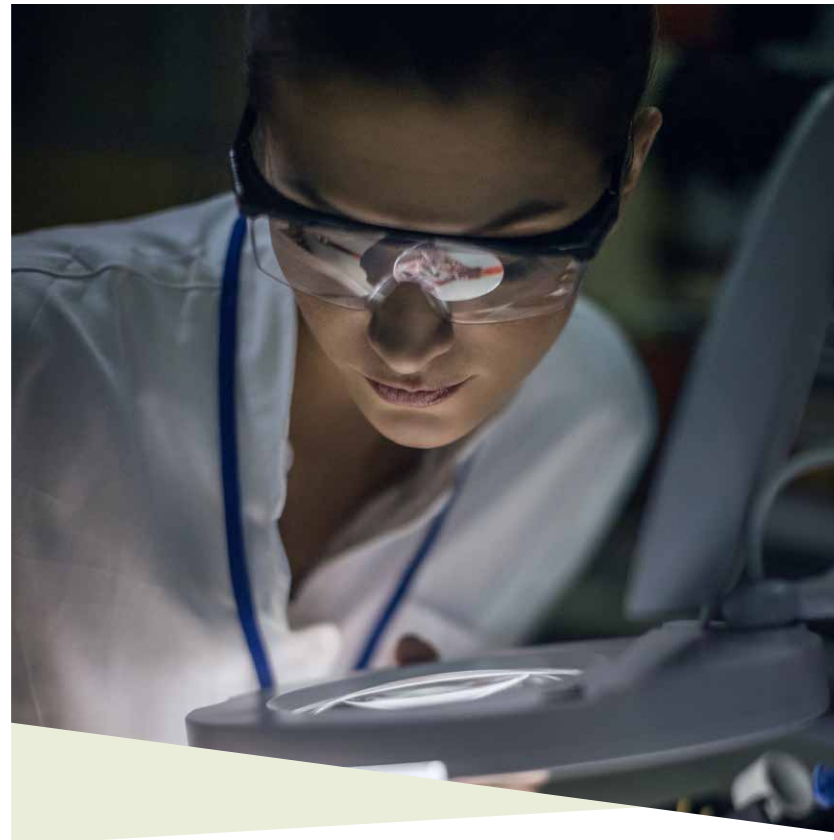
You will comply by reporting building characteristic information but not energy use data. There is a link on the Energy Commission's benchmarking page for this situation.

### How do I benchmark if my building was only occupied recently and doesn't have 12 months of data?

Your building is exempt from reporting if it did not have a permanent or temporary certificate of occupancy for more than half of the calendar year being reported. Otherwise, reporting is required, and you should include as much energy use data as you have.

### How often must I report to the Energy Commission?

Reporting continues annually after the first report, due June 1st every year. Reporting has begun for non-residential, and residential properties begin reporting in 2019.



# California Building Energy Benchmarking Program

A Program of the California Energy Commission

## WHERE CAN I LEARN MORE?

The Energy Commission provides a variety of resources, including a step-by-step guide, a training video, and answers to frequently asked questions. Additionally, there are in-person and online trainings and a dedicated hotline to answer any questions. Information on these resources, including a schedule of upcoming trainings, are posted on the Energy Commission's website at [www.energy.ca.gov/benchmarking](http://www.energy.ca.gov/benchmarking).

## QUESTIONS?

California Energy Commission Hotline  
(855) 279-6460  
[benchmarking@energy.ca.gov](mailto:benchmarking@energy.ca.gov)



[energy.ca.gov](http://energy.ca.gov) | [facebook.com/CAEnergy](https://facebook.com/CAEnergy) | [twitter.com/calenergy](https://twitter.com/calenergy)



## UNDERSTANDING ENERGY USE

- ▶ Benchmarking provides a baseline understanding of energy use
- ▶ Research suggests that benchmarking can lead to savings of about 3% in annual energy expenditures
- ▶ Benchmarking helps enable smarter and more cost-effective improvements in building energy use

## WHO MUST BENCHMARK

Buildings in California that have a gross floor area of 50,000 square feet or more are required to benchmark their energy performance using EPA's ENERGY STAR Portfolio Manager and annually report the results to the California Energy Commission.

DISCLOSIBLE BUILDING TYPE	NO RESIDENTIAL UTILITY ACCOUNTS	17+ RESIDENTIAL UTILITY ACCOUNTS
FIRST REPORTING DEADLINE	JUNE 1, 2018 (2017 DATA)	JUNE 1, 2019 (2018 DATA)
FIRST BUILDING-LEVEL PUBLIC DISCLOSURE	2019 (2018 DATA)	2020 (2019 DATA)



### Exemptions:

- Property with 1 to 16 residential utility accounts
- Condominium projects
- Buildings scheduled to be demolished one year or less from the reporting date
- Buildings already reporting to an approved existing local ordinance: Berkeley, San Francisco, and Los Angeles
- More than half of the building's area used for:
  - Scientific experiments requiring controlled environments
  - Manufacturing or industrial processes

## HOW TO COMPLY

### What do I need to collect for ENERGY STAR Portfolio Manager?

- Collect property attributes
- Create a Portfolio Manager account
- Enter all buildings for which compliance is required
- Create meters for utility data

### How do I get my whole-building data?

Building owners, owners' agents, and operators can request data from utilities for:

- Any non-residential building with 3 or more active utility accounts of one energy type
- Any non-residential building with less than 3 active utility accounts, where all account holders have agreed to share their energy use
- Any residential building with 5 or more accounts of any one energy type

### How do I submit my data?

- Review data gaps or errors (e.g. Run Data Quality Checker on Portfolio Manager)
- Visit the Energy Commission website for reporting links
- Submit data directly through Portfolio Manager by clicking the reporting link found at [www.energy.ca.gov/benchmarking](http://www.energy.ca.gov/benchmarking).



## California Building Energy Benchmarking Program

# FACT SHEET FOR MULTIFAMILY UNITS



In October 2015, the State of California started the California Building Energy Benchmarking Program to provide building owners access to their building energy use data from utilities, and to track consumption in their buildings. The purpose of the program is to help building owners, tenants, and others better understand the energy consumption of their buildings through standardized energy use metrics.

### Why benchmark?

- You can't manage what you don't measure; benchmarking provides a baseline understanding of energy use.
- Research suggests that benchmarking, which allows for a building's energy use to be compared to its prior performance and to that of its peers, can lead to savings of about 3 percent in annual energy expenditures.<sup>1</sup>
- Benchmarking provides building owners with knowledge that enables smarter and more cost-effective improvements in building energy use.

### What do building owners need to do to comply?

Benchmarking requires combining the energy bills from a building's utility with basic physical and operational characteristics of the building (such as size, type of use, and hours of operation). Building owners must enter this information into a free, online tool—ENERGY STAR Portfolio Manager—which will generate results to track building performance over time and compare the performance against that of its peer buildings. Building owners must annually report their data directly through Portfolio Manager via the reporting link on the Energy Commission's website.

**The California Building Energy Benchmarking Program will help you better understand your energy usage.**

### Exempt Properties

- A property with 1 to 16 residential utility accounts
- Condominium project (townhouse if it is legally considered a condominium)
- More than half of the building area used for (1) scientific experiments requiring controlled environments, or for (2) manufacturing or industrial purposes
- Scheduled to be demolished one year or less from the reporting date

## Who has to benchmark their building under the Benchmarking Program?

<b>DISCLOSABLE BUILDING TYPE</b>	<b>17+ RESIDENTIAL UTILITY ACCOUNTS</b>
<b>FIRST REPORTING DEADLINE</b>	<b>JUNE 1, 2019 (2018 DATA)</b>
<b>FIRST BUILDING-LEVEL PUBLIC DISCLOSURE</b>	<b>2020 (2019 DATA)</b>

Owners of buildings in California that have a gross floor area of 50,000 square feet or greater are required to benchmark their energy performance annually, and report the results to the California Energy Commission per the schedule shown. Comparative information on each building's performance will be posted on a public website during the second reporting year for each group.

1. Palmer, Karen, and Margaret Wells, Does Information Provision Shrink the Energy Efficiency Gap? (Washington, DC: Resources for the Future, 2015), accessed at <http://www.rff.org/files/sharepoint/WorkImages/Download/RFF-DP-15-12.pdf>

# Fact Sheet for Multifamily Units

## How do building owners get energy use data for their buildings?

The California Building Energy Benchmarking Program requires energy utilities in California to provide monthly building-level energy use data for at least the previous calendar year to building owners, owners' agents, and operators of any of the following, upon request:

- Any residential building, other than a condominium, with five or more active utility accounts of any one energy type

## How does this affect compliance with local benchmarking requirements?

For buildings that must comply with a local benchmarking requirement (currently in place in Berkeley, Los Angeles, and San Francisco), local jurisdictions can apply and receive an exemption from the California Energy Commission. Once an exemption is received, building owners under that local requirement will only need to follow their local reporting instructions and not need to report separate benchmarking data to the California Energy Commission.

## How do I get my whole-building data?

For residential buildings with at least five utility accounts, no tenant authorization is needed to request aggregated data from the utility. Each utility will have their own process to request data, so visit the utility website for more instructions. If you have less than five utility accounts, you are not required to comply with benchmarking and disclosure.

## What do I need on ENERGY STAR Portfolio Manager?

- Collect property attributes
  - Gross Floor Area
  - Number of Residential Living Units
  - Occupancy
  - Number of Buildings
  - Year Built
  - Number of Bedrooms
- Create a Portfolio Manager account
- Enter all buildings for which compliance is required
- Create energy meters for utility and consumption data

## Am I required to benchmark my building's energy usage?

Compliance is required from single buildings. Compliance is required from properties if the property has multiple buildings served by a single meter.

Is your building larger than 50,000 square feet?

YES

NO

Are you already reporting to a local ordinance that has applied and received an exemption?  
(Berkeley, Los Angeles, San Francisco)

YES

**NOT REQUIRED**  
Your building is exempt from state requirements. Your building is not required to report building data to the California Energy Commission.

NO

Does your building have at least 17 active utility accounts of a single energy type, one of which is residential?

NO

YES

**REQUIRED**  
Your building is required to report building data to the California Energy Commission.

## How do I submit my data?

- Review data gaps or errors via the Data Quality Checker tool on ENERGY STAR Portfolio Manager
- Visit the Energy Commission website for reporting links
- Submit data directly to the Energy Commission through Portfolio Manager by clicking the reporting link at [www.energy.ca.gov/benchmarking](http://www.energy.ca.gov/benchmarking) [energy.ca.gov](http://energy.ca.gov).

## Where do I learn more?

The Energy Commission will provide a variety of resources to assist with benchmarking, including a step-by-step guide, a training video, and answers to frequently asked questions. Additionally, there are in-person and online trainings and a dedicated hotline to answer any questions. Information on these resources, including a schedule of upcoming trainings, will be posted on the Energy Commission's website at [www.energy.ca.gov/benchmarking](http://www.energy.ca.gov/benchmarking). Additional information on the process to request building data can also be found on the Energy Commission's website or by contacting the utilities serving the building.

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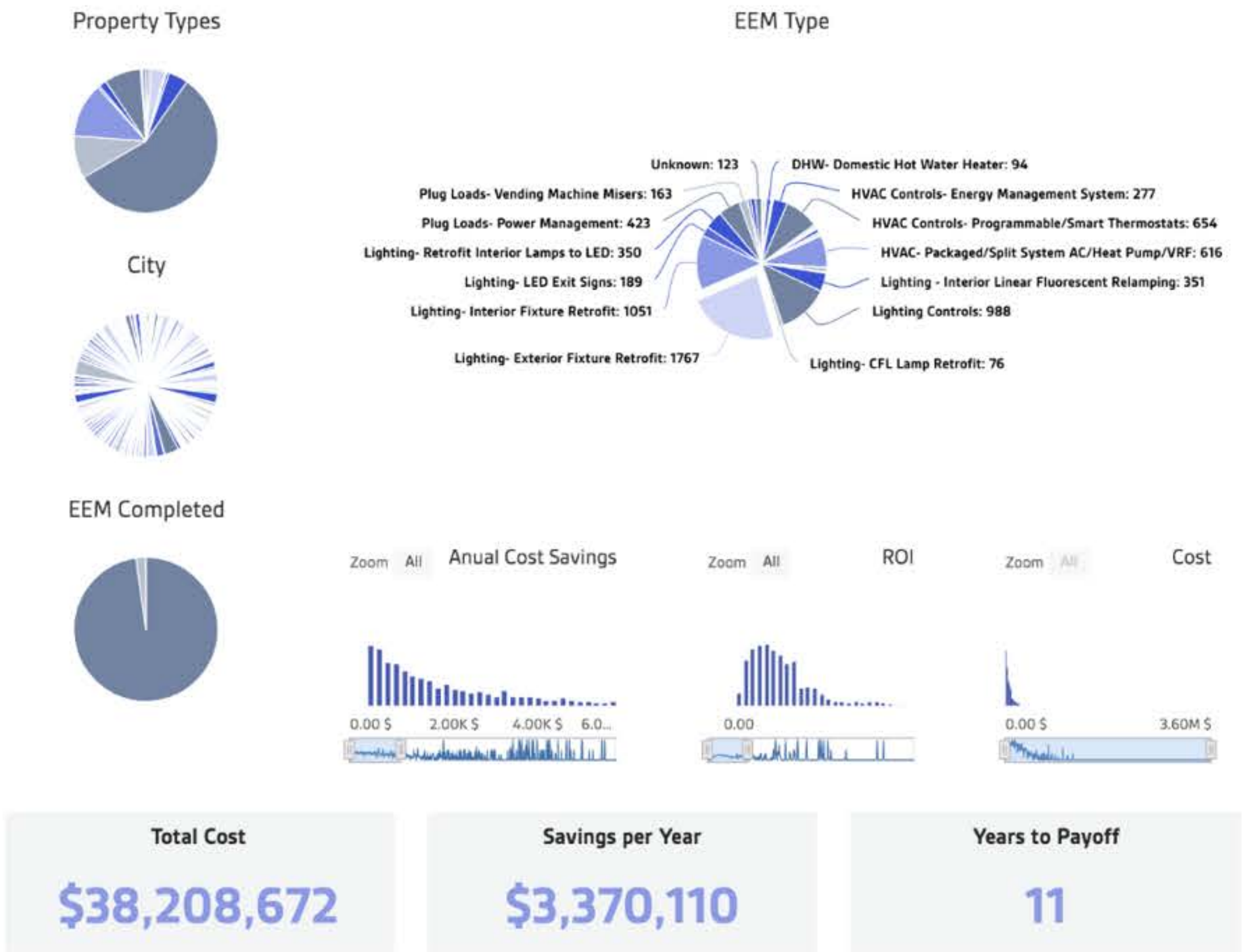




# maalka | California Energy Commission Prop39 Budget Tracking






## California Energy Commission

- \$500m in energy efficiency investments across California
- 3210 Schools, 10,000+ Building Meters
- 4231 Smart Meters
- 350mil Data Points
- Maalka developed an app to help CEC analyze how it was allocating its \$500m budget and to understand the progress of the implementation of Energy Efficiency Measures schools across California



# Maalka Facility EUI - Map Representation

Dashboard SoCal Gas Portfolio


Program:    App:  





**Details** Distribution EUI by Building Files Incentives Outreach

**FILTER PROPERTIES** ?

Search...

Cards Table **Map**



Map controls:    

+ Create Portfolio Message Selected Properties

# City of Brisbane Benchmarking And Transparency Ordinance

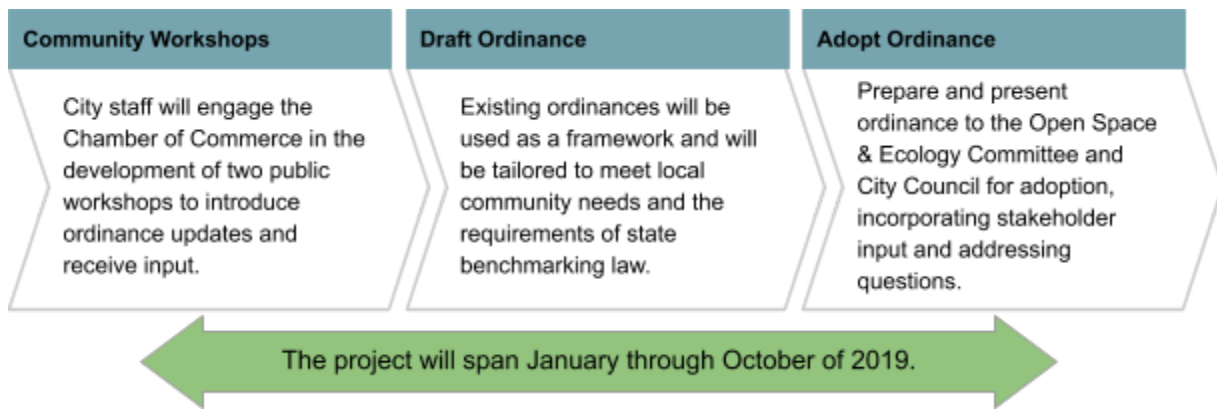
## Internal Stakeholder Fact Sheet



**What?** The City of Brisbane is developing a new ordinance for commercial buildings within city limits related to energy and water benchmarking. In this case, benchmarking refers to the process of measuring and tracking usage in comparison to yourself and to others.

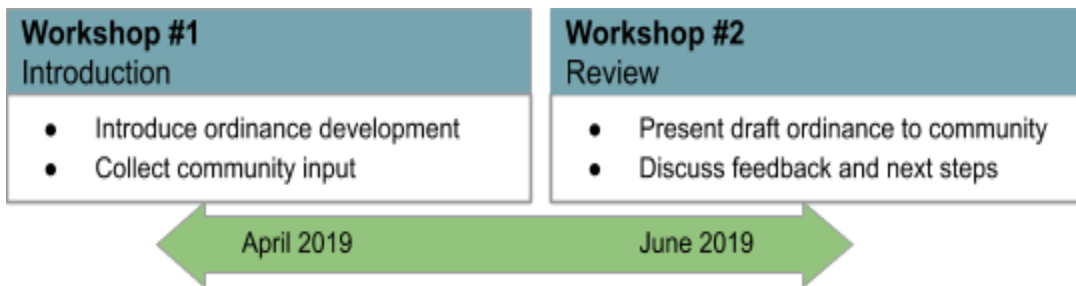
**Why?** The goal for the City is to collect quality data and drive more efficient buildings while reducing waste and emissions. This work is supported by a Bay Area Air Quality Management District Climate Protection Grant which is separated into two phases; phase one will support ordinance development and phase two its implementation. This fact sheet focuses on the phase one efforts.

### Building the Ordinance



### Stakeholder Engagement Goals

Effective stakeholder engagement gives community members the opportunity to contribute to the development of the ordinance and this feedback helps ensure it is widely supported. In developing the ordinance, the community will be invited to provide input at two key phases, but questions and feedback are encouraged on an ongoing basis. This includes:



### Role of Internal Stakeholders

As internal stakeholders, City employees play an important role in the process. Staff from various departments hold relevant knowledge and expertise that will shape strategies incorporated as part of the ordinance. City employees should be aware of the ordinance development effort and relevant updates to answer questions from the community at-large, and will ultimately play a key role in ensuring the ordinance’s long-term success.

Want to learn more? Please contact Adrienne Etherton: [aetherton@brisbaneca.org](mailto:aetherton@brisbaneca.org) or 415.508.2118