Energy Independence Security Act (EISA) §432 2019 Reporting Overview

U.S. DEPARTMENT OF ENERGY

DOE Sustainability Performance Office

May 2019 _Update_

- EISA §432 - 2019 Reporting Schedule
- Relevant Dashboard Modules
  - *Overview of relevant data entry modules*
  - *Known issues*
  - *Advice*
- Benchmarking Reminders and Advice
- Dashboard Key Resources

EISA §432 - 2019 Reporting Schedule

Activity	Date
March 4, 2019	Dashboard opens for FY 2019 data and SSP narrative entry.
March 22, 2019	EISA §432 Covered Facility status confirmation including energy and water use are due with appropriate level(s) of approval.
March 29, 2019	Benchmarking data from Portfolio Manager released to CTS by SPO
June 21, 2019	**EISA §432 Evaluation, Projects, and Measurement & Verification data are due with appropriate level(s) of approval.**
December 20, 2019	**Benchmarking data from Portfolio Manager released to CTS by SPO for weatherization credit at agency level EUI**

NOTE: _Starting in 2019, SPO will be scheduling relevant training sessions throughout the year. Be sure to check the Dashboard regularly for trainings._

Direct Entry: EISA §432 Evaluations

1. Confirm Energy Manager
2. Enter current cycle evaluation dates
3. Confirm evaluation data is actual via checking the dialogue box
4. Enter evaluation type
5. Enter if the covered facility is appropriate for retro/re-commissioning assessment *(REQUIRED to complete field for all Covered assets)*

Entry via Template: EISA §432 Evaluations

- Data entry requirements for the template are the same as the module; template includes current data in separate tab to reduce data entry.

- *Audit cycle message is still incorrect. If you have an audit due this year your program office POC has been notified. If unsure, email SPO.*

- *<u>NOTE,</u> covered status along with associated energy and water usage cannot be adjusted during the period between the March and June deadline for EISA §432.*

- *<u>NOTE,</u> continuous commissioning assessment of covered facilities are part of EISA §432, DOE O 430.1C, and DOE O 436.1. EISA §432 guidance allows for exclusion based on energy intensity and size, less than 50,000 GSF for less intensive facilities*

DOE Sustainability Dashboard - EISA S432 Evaluations Upload Template

Instructions:

Enter data for upload in rows 15 and greater.

Please copy and paste fields in red from the *EISA S432 Evaluations - Current* tab. These fields are not adjustable and must be consistent with information in the Dashboard for proper upload.

If the facility is considered Covered, blue fields are required. Updates must be completed before the March deadline and cannot be changed until after the June deadline.

If the facility is considered Covered, the current 4-Yr evaluation cycle date, actual status, and type must be updated before the June deadline. Evaluation cycle information can be reported either combined, green fields, or separate, purple fields. Future evaluation date is for planning and an optional field.

If facilities are benchmarked, it is recommended to upload the information before updating evaluation status. For guidance on uploading benchmarking data see the Dashboard User Guide. Energy and water usage will automatically be pulled from the benchmarking data and can be copied over from the *EISA S432 Evaluation – Current tab*. Note, if there aren't 12 consecutive months of data for the fiscal year or other errors, usage data will not be updated automatically.

If the facility's Covered status is being changed, a justification for the change must be provided.

CAUTION, if copying all information from the *EISA S432 Evaluations - Current* tab to paste over then edit, be sure to paste as value to maintain the drop-down selections.

Facility Identification Information				Facility Annual EISA S432 Evaluation Data										
Site # - Site Name - Program Office	Property Name	Property ID	Real Property Unique ID	Period	Covered Facility	PM Benchmarking Data	Prior FY Energy Use (10^6 x Btu/Yr)	Prior FY Water Use (10^3 x Gal/Yr)	Previous 4-Yr Evaluation Cycle (Energy + Water)	Current 4-Yr Evaluation Cycle (Energy + Water)	Evaluation Date is Actual (Energy + Water)	Future 4-Yr Evaluation Cycle (Energy + Water)	Evaluation Type/Level (Energy + Water)	Describe Other Evaluation Method (Energy + Water)
				YYYY	Drop-Down				MM/DD/YYYY	MM/DD/YYYY	Drop-Down	MM/DD/YYYY	Drop-Down	

Advice: EISA §432 Evaluations

Requirements	Frequency/When?	Common issues/pitfalls
Designate "covered facilities" comprising at least 75% of total facility (site) energy use, including renewable energy. Covered facilities can be: a) any building, installation, structure, or other property owned or operated by, or constructed or manufactured and leased to, the Federal Government; b) contractor-operated facilities owned by the Federal Government; or c) cost of utilities is directly paid by the Federal Government	Revise as necessary	• Selecting covered buildings • Staying above the 75% threshold when building portfolios change • Auditing a non-covered facility and forgetting to take credit by changing the status to covered
Report energy and water use.	Annually	• Not adjusting energy/water use when portfolio or mission/demand changes • Benchmarking data not up-to-date
Each covered facility continues to be evaluated for: • energy and water measures • commissioning measures	At least every 4 yrs by facility	• Appropriate audit level • Timing of audits • Not marking evaluation date as actual • Not reported/blank fields
Report evaluation date, evaluation area, potential energy/water savings, cost savings, and implementation cost, potential ECMs	At least every 4 yrs by facility	• Individual buildings evaluated more than once in 4 year period

Direct Entry: Efficiency & Conservation Measures

- Enter additional identified ECM findings
- Clean up existing ECMs, by marking them as awarded/funded, operational, or cancelled
- Enter annual M&V findings, especially for performance based contracts

Entry via Template: Efficiency & Conservation Measures

- *Do not upload templates or enter directly into the Dashboard.*

- *If you previously provided updates via email or SSP module, use the same file to update your ECMs. If you don't have a copy of the file ask SPO for it.*

- *If you have never updated your ECMs, download the Dashboard template and update ECM information.*

- *All ECM updates, both pipeline and M&V, should be email to sustainability@hq.doe.gov and Soudeh.Motamedi@hq.doe.gov with program and site office POCs cc'd. No Dashboard approval needed if emailing.*

- *SPO is exploring options for cost sharing on a handful of ECMs. To have an ECM considered by SPO, ensure accuracy!*

DOE Sustainability Dashboard - ECM Pipeline Upload Template

Instructions:

Enter data for upload in rows 16 and greater.

If adjusting an existing ECM, first copy the row from the *ECM Pipeline - All* tab and paste into this upload template tab. All fields can be updated, except those in red. These fields are not adjustable and must be consistent for proper upload.

If adding a new ECM, leave the "ID" column blank.

If adjusting or adding an Identified ECM, fields in purple along with basic site information are needed for proper upload. You'll notice only 6 fields are required, this is because SPO recognizes during the early stages of an ECM not all information is availa

If adjusting, updating status to, or adding a Verified ECM, all fields needed for an Identified ECM along with those in blue are needed for proper upload.

If adjusting, updating status to, or adding an Awarded/Funding Approved or Operational ECM, all fields needed for an Identified and Verified ECM along with those in green are needed for proper upload.

If cancelling an ECM, simply change the status.

All other fields are optional. To upload ECM associated documents, use the data entry module.

Site Identification Information			Measure Description							
ID	Site # - Site - PSO		Site Measure #	If the measure is part of a larger project, provide Site Project #	Dashboard Measure #	Reported Fiscal Year	Measure Status	Measure Type	Measure Name or Description	Is this a multiple or single facility measure?	Impacted fa... real propert... unique ID(s)...

Advice: Efficiency & Conservation Measures

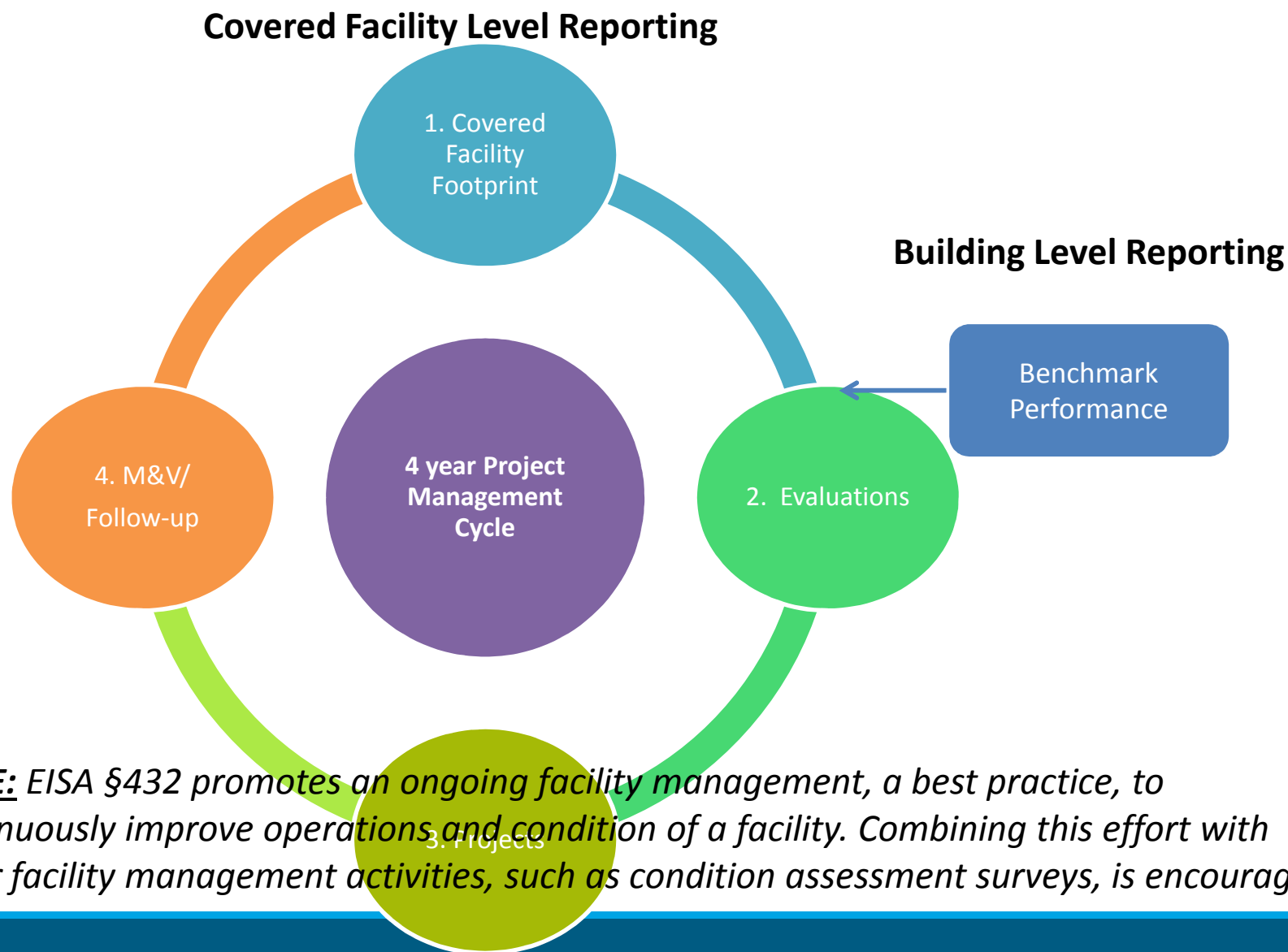| Requirements	Frequency/ When?	Common issues/pitfalls
Report on energy and water saving measures identified during evaluations include implementation cost by source, estimated annual energy/water savings, ECM types	Ongoing	▪ Connecting projects to buildings in covered facilities ▪ Missing/blank data fields ▪ Status and estimates not updated, especially when funded/operational or cancelled
Implement projects with lifecycle cost-effective ECMs		
Monitoring & verification of actual savings from all implemented projects. Which project require M&V? ▪ Project funded via performance contracts (e.g. ESPCs, UESCs, PPAs, EULs) ▪ Appropriated funded projects with cost savings over $10K/year, amortized annual cost is less than annual cost savings, or M&V cost is less than cost savings. For more see chapter 15 of DOE Financial Management Handbook. What qualifies as M&V? ▪ Approach must be consistent FEMP M&V Guidelines (retrofit isolation and whole facility methods)	Integrated with continuous 4-year evaluation cycles	▪ Lack of reporting

Benchmarking Reminders & Advice

- Benchmarking page in the Dashboard is still under development.

- As long as a site is benchmarking in Portfolio Manager (PM), facilities are considered compliant with the EISA §432 requirement

- Sites can share facilities in PM as read-only with SPO Master Account at *USDOESPO*

- Once operational, data uploaded into the Dashboard's benchmarking module will be auto populated into the EISA §432 Evaluations module. Sites can also directly upload PM data to CTS, but data will not be populated in the Dashboard.

- Benchmarking is required for all buildings that are both metered and covered

- It is recommended that FY benchmarking data has been updated in PM by end of CY

Requirements	Frequency/When?	Common issues/pitfalls
Portfolio Manager is required benchmarking system	Annually	- Accounting for non-electric fuels used in electric-metered facilities - Missing required fields in Portfolio Manager - Need 12 consecutive months of data - Unique building IDs for "U.S. Agency Designated Covered Facility ID" and/or "U.S. Federal Real Property Unique ID" do not match

Advice: EISA §432 Reporting Framework

Covered Facility Level Reporting

Building Level Reporting

1. Covered Facility Footprint

Benchmark Performance

4 year Project Management Cycle

2. Evaluations

4. M&V/ Follow-up

3. Projects

NOTE: *EISA §432 promotes an ongoing facility management, a best practice, to continuously improve operations and condition of a facility. Combining this effort with other facility management activities, such as condition assessment surveys, is encouraged.*

Dashboard Key Resource

Below are several resources available in the Dashboard under the Resources module. For ease of search, filter for "Energy Management."

- DOE Sustainability Dashboard User Guide – includes detailed data entry descriptions

- Facility Energy Management Guidelines and Criteria for Energy and Water Evaluations in Covered Facilities, November 2008

- Guidance for the Implementation and Follow-up of Identified Energy and Water Efficiency Measures in Covered Facilities , September 2012

- Federal Building Energy Use Benchmarking Guidance, August 2014 Update

- Federal Building Metering Guidance, November 2014 Update

- Operation & Maintenance Best Practices, Revision 3, August 2010

- Metering Best Practices: A Guide to Achieving Utility Resource Efficiency, Release 3.0, March 2015

- Commissioning for Federal Facilities, July 2014

- Continuous Commissioning Guidebook for Federal Energy Managers, October 2002

Thank you!!

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