FY 2018 DOE Sustainability Dashboard
Frequently Asked Questions (FAQ)

October 2018 - Volume 1

Background: The following questions and comments were addressed during the DOE Sustainability Dashboard Trainings and Open Line Help Calls. The Dashboard Trainings are organized and managed by the Sustainability Performance Office (SPO) to assist with annual DOE sustainability reporting and the new reporting tool, the DOE Sustainability Dashboard. The schedule for future calls can be found on the SPO's Sustainability Dashboard homepage: sustainabilitydashboard.doe.gov

Contact Information: Please direct comments and questions to Dashboard Team at sustainability@hq.doe.gov.

General Announcements & Updates

Sites may use the SSP narrative module in the Dashboard ***or*** upload a Word or PDF plan with supporting documents as an attachment to the Dashboard's SSP module in the Executive Summary section. FY 2018 data is due **December 7**, and the SSP narrative is due **December 14**, 2018.

Due to this year being a transition period for goals and targets, the Dashboard's OMB Scorecard, Comprehensive Scorecard, Performance Graphs, and the ability to use Dashboard generated graphs for the SSP narrative will be disabled for FY 2018.

Green Building data has been rolled over from prior year, so sites should see historical data in the Green Buildings module. Any DOE Owned building that met the 2008 GPs is considered "grandfathered." *Note: GSA's 2018 FRPP Guidance updated the definition of "Not Applicable" to include: Unoccupied, low/no energy use (<12.7 kBTU/GSF), and low/no water use (<2 Gal/Day (GPD)).* Leases are NOT included in % GP calculation, but SPO encourages you to continue to incorporate language into leases, and report of GP compliant leased buildings. The Green Building module will no longer be locked Oct 24th due to saving issues. The data will be due along with all other submissions Dec 7th.

General Dashboard Questions

Question: How do you reset a password or unlock an account?

Answer: Reset your password using the Forgot Password function. After three wrong password attempts, your account will be locked. Contact the Dashboard Team at sustainability@hq.doe.gov to unlock your account.

Question: Why do I only see a few data categories on the Data Entry Homepage?

Answer: User accounts are mapped based on the Responsibilities selected at the time they registered. Users only see the data categories for which they selected as a Responsibility. Please contact the SPO Dashboard Team if you need access to more data categories (sustainability@hq.doe.gov).

Question: Can you export or access the raw data for a site similar to the CEDR?

Answer: Use the "Create a Report" function located under the Reports menu. This ad hoc reporting tool will allow you to export data to an Excel file by selecting parameters such as site, data categories and fiscal year(s).

Question: How do you make edits to historical data?

Answer: The Dashboard has a change request process that is described in detail in the Dashboard User Guide. In the QA/QC module for the category you wish to request a change, select the specific data point from the data table. You will be redirected to the Data Entry page for that category with the FY and selected data auto populated (and unchangeable) in the entry fields. Select "Create Change Request" at the bottom of the page to proceed. Update the data in the entry fields, provide justification for the request, attach supporting documentation as needed, and enter an additional point of contact. Select "Submit Change Request" to send your request to the SPO Dashboard Team for processing.

Question: How do you see who has access to your site?

Answer: Within the Dashboard, navigate to the Administration tab, and select "Site Profile." Choose your site from the drop-down menu. A table of users with access, rights, and responsibilities will populate on the right-hand side. You can see each user's name, associated DOE program office(s), employment type, Dashboard role, responsibilities, and level of access. Please contact the SPO Dashboard team with any questions at sustainability@hq.doe.gov.

Question: Can you explain how to utilize upload templates for the Data Entry categories that offer them?

Answer: Any category that has an Excel template available for download, allows users to enter data offline and in bulk. These categories are indicated with the green Download Template icon on the Data Entry homepage. Each template has instructions for entering data. When you have completed the template, save the file, and use the Bulk Upload button next to the corresponding category to upload the completed template into the Dashboard.

Site Sustainability Plan (SSP) Module Questions

Question: What are the major changes to the FY 2018 SSP Module?

Answer: The new Mission Change component of the SSP has been added to highlight the importance of missions and impact on sustainability goals. Additionally, the Executive summary table is now MANDATORY and has been revised. Please sees the sample template available on the Resources page. The ETA for the revised format in the SSP Module is end of October to mid-November.

Question: What capabilities will the SSP Module have for including graphs, charts, and pictures? Will the graphs and tables be live in the SSP Module?

Answer: Due to this year being a transition period for goals and targets, the Dashboard's OMB Scorecard, Comprehensive Scorecard, Performance Graphs, and the ability to use Dashboard generated graphs for the SSP narrative will be disabled for FY 2018. Sites are able to drag and drop graphics into their plans from an outside source. All tables, charts, and graphs imported from a non-Dashboard source must be updated offline and re-entered into the SSP Module to reflect the latest information.

Question: Is there a specific font style and size we need to use for the SSP Module?

Answer: No, the SSP Module will offer many of the basic functions that Word does. For example, you will be able to choose your font style/size, bold/underline and highlight text.

Question: Can I include my list of acronyms and signature pages?

Answer: The option to upload an acronym list and signature pages is available in the Executive Summary category and will automatically be incorporated in the generated plan.

Question: Will there be a way to see the changes made by another user or track when something has been edited?

Answer: Yes, similar to the Completion Status module, there will be a "Last Updated By" field on the SSP Module that notifies you of the date of the last update and the user who made changes. Each category can only be edited by one user at a time to prevent version control issues.

Question: In the Guidance it states if there is not much change to a category we don't need to update. Is the status quo check box valid for the whole subject or just the narrative under the category?

Answer: There will be a status quo check box for each of the categories and it will apply to all the related goals within the category. The intent is to reduce reporting if a site has had no change in its progress towards the goal relative to their prior year's performance and there have been no major initiatives or changes to the mission. If you elect to indicate "No Update (Status Quo)" in the Performance Status section, you are <u>still required to provide a Plans and Projected Performance section</u> describing future plans to continue to make progress. The SPO will use historical data to verify current performance is consistent with historical performance. But if a site elects to add a section, then the option to select status quo won't be there. For example, if you want to discuss EISA audit cycles and detailed plans under the Energy Management category you can add a section but will need to discuss both current status and plans.

Question: Can you give an example of what would constitute not giving an update and utilizing the status quo option in a SSP category?

Answer: If FY 2018 performance data is consistent with prior years and following the same trend (i.e. no unusually large increases or decreases in performance for a narrative category), and a site has not had any major initiatives or mission changes in relation to a narrative category, then sites may indicate this by checking the "No Update (status quo)" checkbox. If you elect to indicate "No Update (Status Quo)" in the Performance Status section, you are <u>still required to provide a Plans and Projected Performance section</u> describing future plans to continue to make progress.

Question: As a site with multiple locations, do we now have to create multiple SSPs?

Answer: No, the SSP Module was developed to allow for a site-level reporting capability for those sites with multiple locations.

Question: Where do we upload supplemental documents such as Water, Fleet, or Metering Plans?

Answer: The SSP Module has an upload capability for supporting documents to be uploaded into the Dashboard. Another place to utilize is the Site-level Policy Trackers; these pages act as a hub for all policies and plans related to any given category. These pages are particularly useful for uploading documents that do not change frequently.

Question: What do you want us to do with the "Add Section" capability?

Answer: This is a function built in to give sites the flexibility to organize the plan as they wish. It is up to the site if they wish to utilize this function. For example, a site may wish to break up their Energy Management narrative into multiple sections specific to Energy Intensity, EISA 432, and Metering; this function allows you to create a section for each. Note, there is a limit of 5 total sections, and the main narrative section will still be included in the final narrative.

Question: How do you want the Excluded Buildings List and Excluded Building Self-Certification Letter submitted?

Answer: The Excluded Buildings List and Certification Letter should be uploaded to the Completion Status page. A sample Certification Letter can be downloaded from the Completion Status page and the list of excluded buildings can be downloaded from the Standard Reports page. Note the two documents need to be combined into one prior to upload to the Completion Status page.

Question: Will there be the ability to view other sites plans?

Answer: This capability is not built into the current design, but could be a future development pending further discussion with programs and sites.

FIMS-related Questions

Question: Will the basic FIMS building data still be imported?

Answer: The SPO will import the latest FIMS basic information bi-annually. FIMS data was imported the first week of October.

Question: Will there be some guidance on dealing with the FIMS fields? When will sites need to update and when is it due?

Answer: There is only one sustainability field in FIMS with the remaining asset level information collected in the Dashboard. In the Dashboard, the FRPP Status field for Green Building is an auto generated field based on input in preceding fields. In FIMS, the equivalent sustainability field that needs to be completed has a drop-down selection that is consistent with the FRPP Status field in the Dashboard. The goal is have the Dashboard inform input into FIMS for consistency and accuracy in both systems. For FY 2018, this process may not be as smooth as we work out Dashboard glitches.

Question: Is the FRPP status pulled from FIMS?

Answer: FRPP status is not pulled from FIMS. The FRPP Status in the Dashboard is system generated based on entry in other fields in the Green Building module. FIMS remains the official place of record for reporting FRPP Status for the Green Building goal.

Question: What do I do if my FIMS data is missing from the Dashboard?

Answer: If your metering data, green building data, or covered facility data is missing, let us know, and we will continue to work with the developers to fix this historical data issue. It should be fixed by end of October.

Green Building-related Questions

Question: Why are costs required in Green Buildings for buildings that are meeting the guiding principles?

Answer: This should be an optional field. We are working with the developers to fix this, so in the meantime, please enter "0."

Question: The previous goal of attaining 100% of buildings meeting guiding principles seems unlikely. How likely is it that meeting guiding principles will be a set target in the future?

Answer: The guiding principles goal will remain, but what exactly the targets will be are still under discussion. We will have more information for FY 2019 reporting.

Question: In the Green Buildings data upload template, do we only copy over buildings that have changes?

Answer: Yes, under the current tab, only copy the rows for buildings that have changes/updates.

Metering-related Questions

Question: Regarding the number of asset level meters on the Metering page, we do not have the ability to fill these values in.

Answer: This is an error, and we are working with the developers to fix this.

Question: Do we have to meter for hot water usage?

Answer: Statute requires metering for electricity, natural gas, and steam. All other utilities are meter as appropriate and as a best practice.

Fleet-related Questions

Question: Is the Fleet Management Plan still a required document for submission with the SSP? If so, where should we include it?

Answer: Sites should upload the Fleet Management Plans to either the site-level policy tracker in the Vehicles & Equipment data entry section or add as a supporting document in the SSP module. The SPO anticipates that sites will review annually and update as needed.

Question: In the Fleet narrative section, is it appropriate to identify what we are interested in pursuing in the future and the associated limitations?

Answer: Yes, please highlight what you would like to do, your limitations in achieving those goals, and where you realistically see your site's performance trending in the Fleet goal area.

EISA-related Questions

Question: How do we report on Portfolio Manager benchmarking data?

Answer: There are two methods for reporting Portfolio Manager benchmarking. The first method, is releasing the data from a site's Portfolio Manager account to the Compliance

Tracking System (CTS). The second method, is for sites to share their facilities in Portfolio Manager with the SPO (USDOESPO).

Question: How do we upload our Portfolio Manager benchmarking data in to the Dashboard?

Answer: At the moment the capability for site to upload their benchmarking data to the Dashboard is disabled. Once the capability is enabled, instructions will be provided.

Question: Can you explain the field "Retro/Re-commissioning Assessment" field in EISA S432 Evaluations?

Answer: Retro/Re-commissioning is a part of each covered facility's comprehensive evaluation and needs to be completed and reported on the EISA Evaluations module.

Greenhouse Gas (GHG) Questions

Question: There is no longer a category for GHG emissions. Where do we input the narrative portion for this?

Answer: Because GHG emissions are based on multiple categories, SPO streamlined the approach to allow sites to touch on their given GHG emissions as they relate to each category.

Question: In the past, scorecards showed the breakdown of GHG scope 1, 2, & 3 emissions. How do we generate those calculations without access to the Scorecards?

Answer #1: Scope 1 & 2 GHG Emissions

1. Download the following reports for the current FY and baseline (FY 2008) from the Create a Report for your site:
    a. Energy
    b. Fugitives & Refrigerants
    c. Fleet Fuel
    d. Non-fleet V&E Fuel
    e. On-site MSW
    f. On-site WWT
    g. Purchased Renewables
2. Sum the column "GHG" in each spreadsheet.
    a. For Purchased Renewables, sum "GHG Avoided based on Electric" column for RECs only and subtract for credit.

b. If your site utilizes biomass as a RE, this is counted towards your GHG emissions. All other RE is considered at zero emissions and does not count in calculating GHG emissions.

$$\frac{[\text{Current Scope 1 \&2 GHG/Yr} - \text{ FY 2008 Scope 1 \& 2 GHG/Yr}]}{\text{FY 2008 Scope 1 \& 2 GHG/Yr}}$$

Answer #2: Scope 3 Emissions

1. Download the following reports for the current FY and baseline (FY 2008) from the Create a Report for your site:
   a. Energy – T&D Losses
   b. Air Travel
   c. Ground Travel
   d. Commute
   e. Off-site MSW
   f. Contracted WWT
2. Sum the column "GHG" for all categories except Energy (T&D calculation explained below).
3. To calculate your T&D Loss GHG Emissions:
$$\frac{6.18\%}{(1-6.18\%)} \times Grid\ Electricity\ GHG$$
4. After you sum your current FY and baseline year, use the following formula:

$$\frac{[\text{Current Scope 3 GHG/Yr} - \text{ FY 2008 Scope 3 GHG/Yr}]}{\text{FY 2008 Scope 3 GHG/Yr}}$$

Organizational Resilience Questions

Question: Do we have to answer all of the questions in the Organizational Resilience Questionnaire?

Answer: No, this data entry category is optional, but we do ask sites to discuss any relevant work or progress in the area in their SSP Narrative. This data entry category was meant to be an "update as needed" piece. Sites are asked to review the questionnaire annually, and make changes or updates if applicable.

Question: For the Organization Resilience category, do you want responses in the narrative or in the questionnaire?

Answer: Please include responses in the narrative section. The questionnaire is optional.

Electronics Stewardship

Question: For Electronics Acquisition, will you track servers and cell phones?

Answer: Yes, Electronics Acquisition has two new fields: (1) mobile phones (required for FY 2018) and (2) servers (optional for FY 2018 and required for FY 2019).

Question: Will the new data fields on mobile phones impact our EPEAT performance?

Answer: Yes mobile phones will impact EPEAT performance.

Question: Should we continue to track duplex printing?

Answer: Yes, we will continue to track duplex printing. Also be sure you have print management policies and practices in place consistent with GSA FMR Bulletin B-37, *Federal Print Management Practice*.

Question: The Data Center data entry page is still not developed, do we still have to provide a narrative in the SSP?

Answer: Yes, while the data entry page for Data Centers is not yet functional, the narrative portion is still a requirement. Currently Data Center information is reported directly to the DOE OCIO team.

Miscellaneous Questions

Question: If the performance graphs are disabled, then how do we get the information to calculate performance for the executive summary table and SSP narrative?

Answer: You can give a general directional response (e.g. increase, decrease, or constant) or use the "Create a Report" function located under the Reports menu to calculate performance. This ad hoc reporting tool will allow you to export data to an Excel file by selecting parameters such as site, data categories and fiscal year(s). For example, to calculate the Energy Intensity follow the steps below:

1. Download a Create a Report for your site's energy use for the current FY, and the baseline FY or other FY to compare to (i.e. FY 2003, 2015, or 2017).
2. Download a Create a Report for your site's EUI GSF for the corresponding years.
3. Sum the Goal Subject GSF and Goal Subject MMBTU for each FY.
4. Use the following formula to calculate EUI in BTU/GSF for the Current FY and baseline:

$$\frac{[Goal\ Subject\ BTU/yr + Green\ Energy\ Purchases\ BTU/yr]}{Current\ Goal\ Subject\ GSF}$$

5. Once you have calculated the BTU/GSF for the current FY and whatever FY you're using to compare, calculate the change:

$$\frac{(Baseline - Current)}{Baseline} \times 100 = EUI\%$$

6. See Dashboard User Guide Section 10.4.2 for more details on calculations used in Dashboard for performance goals.

Question: How are people supposed to articulate goals that aren't set by DOE senior leadership?

Answer: Continue to use the previous goals and targets until DOE senior leadership sets goals and targets. You will see the previous goals in the executive summary table online. We will be gauging your responses to determine whether these goals can be met, or whether we should revise these goals.

Question: Regarding goals, should we outline what we have achieved or should we project performance?

Answer: For FY 2018, use the previous goals and targets to discuss your progress thus far and projected progress towards meetings these goals. SPO will work with the Programs on utilizing the information provided in your SSPs and the Implementing Instructions for E.O. 13834 to develop a path forward for FY 2019.

Question: The new SSP guidance requests specific charts and tables. Why do some categories, such as waste and fleet, not have any recommended charts or tables?

Answer: The intent was not to suggest we do not want any charts or graphs, but allow sites the flexibility to include what they deem important. We specified some charts and tables to help inform our decision process in determining goals and targets for some of the high impact areas moving forward.

Question: Where should I input information related to local/regional planning in the SSP Narrative?

Answer: This is up to sites to include as they deem necessary. An example of an area to touch on it is the Travel & Commute section. Sites may discuss site participation in regional transportation planning, recognition of existing community transportation infrastructure, and incorporation of such efforts into site policy and guidance documents.