

Sean Williamson: Hello and welcome to ESPC in the eXpress Lane. Thank you for joining us today as we celebrate the launch of eProject eXpress, a new tool from US Department of Energy and Lawrence Berkeley National Laboratory. eProject eXpress is a gamechanger for state and local governments looking to tell the success story of their energy efficiency projects and programs. I'm very excited to share it with you all today alongside my co-presenters. Next slide, please.

My name is Sean Williamson, and I'm an energy technology program specialist at the US Department of Energy working to support state and local governments with their energy efficiency goals. I'll be joined by three co-presenters today, who I'll now introduce.

First up, Dale Hahs. Dale presently serves as a technical assistance provider for the Energy Services Coalition State Technical Liaison Team. Aside from his active role with ESC, Dale continues to support the continuous improvement of the nation's compendium of best practice tools, resources, instruments and guides for guaranteed energy savings performance contracting programs and projects. Prior to this role, Dale was a member of the leadership team of an ESCO for over a decade and has been engaged in energy efficiency providing client solutions for over 30 years.

Next is Liz Stuart. Liz is a program manager and researcher in LBNL's Electricity Markets and Policy Department. Since joining the lab in 2009, Liz has been lead or coauthor on more than two dozen LBNL reports, policy briefs and peer-reviewed journal articles on topics including ESCO industry market and project trends, building energy benchmarking and energy-efficiency programs and policies. Liz leads software development and stakeholder engagement for eProject eXpress.

Last is Reid Conway. Reid is the senior energy specialist for the North Carolina Energy Office in the Department of Environmental Quality. He has held this role for over four and a half years where he serves as representative and technical advisor statewide on all energy-related issues and events, including serving as technical advisor and consultant on all public North Carolina performance contracting projects.

I want to share one housekeeping note as well. We will not be doing a full question-and-answer session today. But we'll leave you all with information on how to attend an eProject eXpress training session next month as well as emails to contact our

presenters. We will also have some poll questions at the end of the webinar to gather feedback and will be using Slido, which I'll introduce later. Next slide, please.

Before we introduce eProject eXpress, I want to set the stage for you. Public sector building retrofits enable energy and cost savings, address deferred maintenance, improve facility function, reduce emissions and can offer numerous other benefits. Energy savings performance contracts or ESPCs are hugely popular tool for completing public sector building retrofits. The potential opportunity for additional energy savings in the municipal and state governments, universities and colleges, K-12 schools and hospitals or MUSH market exceeds 200 trillion BTUs.

However, we won't know if we've reached that energy savings potential if we don't collect the data, track progress and report on the results. State and local governments track and measure and verify results to fulfill reporting requirements, to safeguard public interests of the taxpayer dollars if projects don't achieve guaranteed savings. And to demonstrate program and project success in progress towards energy reduction goals.

Historically, however, it has been difficult to easily and consistently track project data due to lack of an easy-to-use tool. This is where eProject eXpress comes in and why we're here today. Now to tell us more about eProject eXpress, I'll turn it over to Dale Hahs. Dale?

Dale Hahs:

Thanks, Sean. In order to help us all reap the benefits from this staggering opportunity that Sean reminds us of, ESC was honored by the opportunity to work alongside Lawrence Berkeley National Labs to reach out and work with you, the states and the ESCOs, about what you needed to best track the impacts of your ESPC programs and projects. That's what we're here to do today. Next slide. I'm just thrilled to be able to join the hundreds of you who have collected here today and introduce to you eProject eXpress, the pathway to easy and effective tracking and reporting of your ESPC project successes. Next slide.

You know, sometime back ESC was enlisted by DOE to introduce – to interview you and to find out firsthand what you were looking for in a new pathway for data management, tracking and reporting for your energy efficiency projects. We asked, we listened, and then we tailored this ESPC data repository specifically to what you told us you needed: quick entry, reliable tracking, easy reporting, secure record storage, a means to document success history. And,

of course, if you're going to collect all this information in one place, well, of course it needs to be secure. The system has a myriad of proven security procedures that have been deemed highly secure by third-party experts. So join me, won't you, for the inaugural tool around some of the parts and features of eProject eXpress. Next slide.

To be sure, eProject eXpress is the streamlined pathway created specifically to state and local governments as a part of eProject Builder. You may note that EPX is found at the same website, the same URL. Now with the addition of EPX, there are two pathways for entering and reporting projects, all of which ultimately land in the same national database. EPX is there streamlined version made for state and local entities to enter and report the types of data that you collect, analyze and report. Next slide. You know, when customers initiate projects in EPX, it's as simple and streamlined as giving the project a name, identifying the market segment, and then inviting the ESCO partner by a specific point person's email address, and that's about it. Yup, less than a minute. And that simple activity triggers an email to go to the ESCO and to the customer confirming the project initiation and yielding the ESCO the opportunity to download an Excel template for offline completion. Next slide.

When you asked for streamlined, here it is. What you see is a screenshot of the single page. That's right—one single page of all the data collection points you wanted to track and maintain. It should be noted that all the fields are voluntary. That means that state programs can decide what data they want collected and tracked from their projects. Some states may want more. Some states may want less—the ultimate in flexibility. We've even suggested for you what we've heard you say was essential, important or useful to track just as a helpful suggestion. So while it's a little hard to see in this screenshot, you may note that having the owner's rep and the financial adviser's information are deemed important, and so it's labeled by a little 2, while in the lower left of the data entry template you can see that the project agreement type is a 1. We heard you say that that was essential to know.

A number of other features were added specific to EPX. For example, energy can be tracked in the same units that show up on your utility bill. Okay, okay so the project math needs to be done in MMBTUs, but you said you wanted to see kilowatt hours. You wanted to see therms. You wanted to see whatever units show up on your bills. Guess what—you get to choose! The measures included in a project are indicated simply by the check of a box

and new for EPX—a host of non-facility measures have been included as well: things like streetlights, traffic signals, even water and wastewater infrastructure. With a few clicks of your mouse, you can record a measures profile to be maintained right along with the other project data.

By the way, some of your interview responses caused us to track things that, you know, we hadn't even considered before. But the lab still found a way to make that work, too. EPX provides for you a couple of fields of that you can customize to collect whatever information you choose. You get to name the field. You assign the units. It's all up to you. Next slide.

Furthering the commitment to easy and streamlined, we also created an Excel measurement and verification template so that each year after the M&V report is received, the summary information can be dropped into this user-friendly format and uploaded into that year's performance record for each specific project. Next slide. Can you imagine that just with the click of a mouse you get an M&V report summary that looks like this one? Wow! All the salient information in a single-page summary report. Oh and maybe just as good, if not better, EPX will also generate a year-over-year cumulative report showing you each year's M&V result. So instead of just knowing what the project was intended to do, now you'll be able to report what the project actually achieved.

In a moment we're going to show you just how simple it is to produce those kind of reports about your projects, but we want to take just a second and draw your attention especially to—next slide—a brand new feature we're especially proud to present called a State Rollup Report. This statistical summary is an excellent way to track savings progress and ESPC projects across the state at any time regardless of how or who they're entered by. It provides a great historical record and enables you to tell you your ESPC success story as it grows. Next slide.

You know, those of us who have been around the industry for awhile know all too well the value of having all the support documents, load calculations, contract copies, witness reports, meeting minutes to refer to over the, well, 10, 15, maybe even 20 years of these projects. If you've ever been in that spot where you're looking for a spreadsheet or a file after you last thought you needed it years and years ago, you know, just what I'm talking about. EPX has provided a document storage area to allow you to load all those files and maintain them right here along with the summary project data. We've even provided an alphabetized list of

files that you may want to ensure that you include. With EPX, we may not know where we'll be in 20 years, but won't it be great to know where the documents can be found that were a part of these creative projects? You just never know what you'll need and when you'll need it.

And speaking of that, we've imagined a little scenario here to give you just a sense of the benefit that EPX can provide. Next slide. So you're in your office. You're managing the 54 things that have made it to your to-do list when you get this call from the Governor's Office. And it says, "Guess what. They'd like a quick little report of the impacts that your ESPC projects have created in the last two years." Wow! So I'd like to invite Liz Stuart to join us now. Liz, care to show our friends just how easy delivering this report can be?

Liz Stuart:

Thanks, Dale. I'm going to put myself on camera here. All right so we're going to show you a quick demo here, so we are on the eProject eXpress site here, and I love that scenario. It's like, okay, I need to get my report and I need to get it fast. Well, clever me, I actually set up my report in advance. And you'll learn how to do that when you take the actual training, but I'll show you an example of a report that you can set up. So if I need something quickly, I can just go over here on the right side of the screen to Quick Links, and under View and Generate Reports, we've got Generate EPX Reports. So I'll click that and that's going to take us to the analysis and reporting feature. And then we simply go to the Report Library. I click that and there's some standardized reports, but then I've got My Saved Reports. So these are custom reports that I can set up and use again and again. And each time they export, they've got the updated data that's in the report.

So I'll show a couple of examples. First, we'll show an example I've called Demo Report #1. Dale, why don't you tell us what this demo report that we've set up represents?

Dale Hahs:

Well, yeah. I mean, as we talked to the states over time, they told us specifically that there were a limited number of things that they were reporting when they were called into these little scenarios. You know, it might be the number of projects indicated here by the 138. It's a little bit small for our demo, but in the total implementation price or the investment amount, so that's always something that people want to know, the guaranteed cost savings and then the total estimated project costs. Then some states talk about, "Well, we'd also like to know which ESCOs for which projects or what the" – I mean there's all sorts of variability that

people have asked. But primarily these were the key things that fell into our report. For that reason, Liz is going to show us a second report because in our interviews of the 44 states and 6 ESCOs that we talked to, they kept telling us about other things that they'd like to be able to report if it was just this easy to gather and simply a few buttons to report.

Liz Stuart:

So here's report – here's Demo Report #2, which is just one example of the different kinds of reports you can put together. So in this case we include also the total project implementation costs or price and whatever the guaranteed cost savings are. But in this case we've added our verified savings. And those—once you've got projects in eProject eXpress and you've uploaded years of M&V data, you're going to have some real results in here that you can report. So we've got the verified annual costs savings, the verified annual electricity cost savings, electricity savings in kilowatt hours, natural gas. There's a whole bunch of categories that you'll be able to choose from: other fuel types, water, O&M, things like that. And it's just that simple. Once you set up your report, you'll be able to bring it up with a click of a button.

Dale Hahs:

Fantastic, Liz! And I just want to comment I think I've been the loudest voice about this. We all know that when we started out keeping track of projects, we started keeping track of construction dollars. Wow! Paid for by savings energy project and all we tracked was construction dollars. Now looking back, what we all want are those units of energy. We want to be able to see the real achievements that are occurring in these projects verified by M&V reports year after year. Once you've stored a report like this in your report in your report library, regardless of the work that goes on, you simply need to call up that report and the system automatically compiles all the information into that report for you. It's really just rather amazing.

And, finally, I'm going to circle back to that concept that we heard quite a bit really. States with mature programs even commented about the fact that some projects from time to time get done outside their purview. Now, we all understand this and, of course, for other states they may not have a program that's genuinely been recording information about projects, but they know that they're there. How do I tell my governor, my legislature, how do I point out the great work of energy efficiency in my state if I don't have any information?

So we worked with the lab and they helped us create this marvelous new tool called the State Rollup Report. This is just a

fantastic way to show summary topline information about all the work that's done within the boundaries, the confines of your state. Liz?

Liz Stuart:

Right. Thanks, Dale. So that – this summary, this State Level Rollup Report is only available to registered users of eProject Builder so that's ESCO's customers, you know, state agencies, federal agencies, et cetera. So you have to be logged in and it's under the Projects Statistics tab here kind of at the middle of the top. And we'll go to the eProject Builder State Rollup Report. Super simple to use. It just gives you some stats about any particular state, so you just go to the state dropdown window and we'll pick California because there are a lot of projects there. And then you click Download Report, simple as that. It's got the latest stats on all of the approved projects in eProject Builder. So I'm just going to save it to my hard drive, and then I'll show you what that looks like.

All right so we're going to show you what the California report looks like. I've got kind of a zoomed-in version here. All right so, hopefully, that's visible. Does that look big enough to folks, I hope? And so it give you two tabs here. One is sort of an overall stats and we've got it broken down by some key market segments here. And it's got such statistics as total number of projects, the total investment amount, the total of the estimated savings at the time of contract signing, the total of the guaranteed cost savings. Then we also have total verified cost savings to date. So if there were enough projects in here that had verified savings, you would see some results. So far it looks like three federal projects have verified cost savings.

And one thing to know about this rollup report: any result that has fewer than 10 projects in it will not show up on the report in order to protect the anonymity of the data. So if you see a zero, that's usually because, for example, there's only three projects here with verified savings, and they don't show up. Total project floor area, average annual estimated energy savings and average annual estimated water savings. So it just gives you a real good look at what all is happening in your state for projects that have been entered into eProject Builder and approved. So, of course, if projects haven't been entered, you won't see them in here. So the more projects we get in, the better you'll be able to see.

We also have a second tab here that just has the guaranteed savings projects, which are, of course, the majority of projects in eProject Builder. There's a few other types of projects such as UESC and

direct funded projects that wouldn't be included in here. So that's a quick look at what the State Rollup Report looks like. Back to you, Dale.

Dale Hahs:

Thanks, Liz. So exciting to think about all the different ways folks will begin to use these reports. You know, through the entire development process of EPX, states have been our guide. And here to share with us a little bit about his views is Mr. Reid Conway of North Carolina. We owe Reid a big thank you for his time and devotion for providing input for his real-world considerations in the development of EPX. He was willing to step through, well, more than a couple of draft versions with us and was always willing to share straight up what would be helpful and what would not be helpful in a new pathway for collecting and storing project information. And I just want as one of the states that continues to lead the nation with a mature, successful performance contracting program with well over a half of a billion dollars of work completed for the taxpayers of North Carolina through paid-for-by-savings projects, we asked Reid if he'd join us today and share his perspective. Mr. Conway?

Reid Conway:

Thank you so much, Dale. Very kind words for the State of North Carolina and their performance contracting program. And so as many of you know, I've been a part of North Carolina's program for many years. But the problem we've been having is our outdated way of storing data and tracking data along with performance contracts across the state. So right now what normally happens is an individual team member who is overseeing a specific performance contract would be required to capture data, put that data in our database, log it into spreadsheets. And so over the years, as folks come and go within not only the State Energy Office but with the ESCOs and with these projects, the State Energy Office really becomes more like a library for this information, and so the problem becomes gaps in data.

And so when you work with engineers or you play one TV like I do [*laughs*], gaps in data are not a good thing. So when I realized I was really the last man standing in North Carolina with performance contracting, I wanted a better way. I needed a better way to try and capture this data. I was looking for, let's say, a better mousetrap. And like many of you, I've attended eProject Builder webinars. I even had our North Carolina chapter of our Energy Services Coalition members sit through some of these eProject Builder webinars.

We see on the ESCO side all of the federal side of these ESCOs, they are already familiar with eProject Builder, but they know the product. But I was looking for something simpler. I'm from North Carolina. We like things set, straightforward and simple. And so I got this call from Dale in the Energy Services Coalition team asking if I'd participate. And I said, boy, you really want information from me? I can talk to you about what I need, and so I got to tell them exactly what I needed, the data that I was not gathering. I got to tell them that it had to be easy to use. It had to – the information had to go in there easy. And at the end of the day, I was thinking about how do I get some help with this data? And so why is it always me entering data and not the energy service company, who actually has access to the data? It should be more on them to produce that data.

And so, as Dale said, I got to see very early drafts of eProject eXpress and I got excited to the point of saying, hey, I think this is something we can use in North Carolina. And I didn't really want to use a hammer in North Carolina. And that's a joke, by the way, because, as you all know, state energy offices really don't have much authority on any of this stuff. And so how can I get this implemented in North Carolina? How can I get everybody's buy-in to move forward in North Carolina?

So first thing I did was set up a meeting with our Energy Services Coalition and invited Dale down to come through a do some training on eProject eXpress on some of the early versions so that the Energy Services Coalition in North Carolina could see and begin to see what I was seeing about the value that this service was going to provide because at the end of the day, any report that I turn into the legislature on performance contracting is their report because it helps state was performance contracting is doing in North Carolina. So they are as excited as my annual report as I am about producing it, and it helps if everything's moving smoothly.

And so by using eProject eXpress, we're going to be able to gather more data to be able to move different metrics that we now don't have the access to. And so as I get these calls for old documents from who knows where from sometime long ago wanting a particular schedule out of an IGA that they hope that the State Energy Office kept, being able to put all of that information to be able to store that, knowing where that information is, looking at meeting minutes, looking at any type of contract documents and notes that eProject eXpress can house in one location is critical.

And so we, as Dale said, had been tracking performance contracting in North Carolina for over 20 years with just spreadsheets, and so we're capturing limited data. And so I've been on this path looking for a more modern way to track projects and being able to get better reports that prove that performance contracting is doing a better job in North Carolina. And at the end of the day, all of us want to show the benefits of this program of guaranteed energy savings aiming for necessary improvements. And as we continue to move forward with eProject eXpress, I'm looking forward to getting the training. But as much as that, I'm looking forward to being able to go back and input our legacy projects into eProject eXpress so that our data is finally in one easily accessible place.

I've included my contact information. If you want to reach out, feel free. My email is listed. You can call me on my cell as well. So thank you so much for this opportunity, both Dale and Sean. So back to you, Liz.

Liz Stuart:

Thanks, Reid, very much. Next slide, please. We want to wrap up with a little bit of information about the technical support that both Lawrence Berkeley National Lab and Energy Services Coalition, our training partner, provide. So Dale and his team are going to be doing the monthly eProject eXpress training webinars. And we've scheduled the first one for August 19th, 12:00 PM Eastern. You can register at this link. We'll post this on the eProject Builder, eProject eXpress website and it'll be publicized.

And then, of course, we offer support materials and guides. Right now there's a nice little eProject eXpress Quick Start Guide up on the website. We're developing some on-demand training videos that we'll roll out so those will be available on the help page of the website. And then, importantly, we're going to offer free one-on-one support for teams. Let's say you're a state energy office and you're ready to go. We can sit down with you, talk about your strategy, talk about the best ways to get you trained, get your ESCOs trained, get language in your whatever documentation if you need to add language to your contract documents, whatever you need to get you up to speed on the system and also help you with the stakeholder buy-in.

And then, as Reid mentioned, a lot of you probably have projects that are in some database, maybe Access or Excel documents or something somewhere. We can also help you get those projects into eProject Builder so that you have everything centralized and available to report on easily. And you can always reach us by

emailing our tech support address, which is EBP-support@LBL.gov. Next slide.

So if you're ready to register for an account, you can go to the eProject Builder site and register and we'll grant your account usually within a day or so. And these are the contact information for the EPX training team, myself and Dale and our EPX tech support email address. And I think I'm going to hand it back to you, Sean. Thanks!

Sean Williamson: All right. Thank you Dale, Liz and Reid for that wonderful overview of eProject eXpress. I can't wait to see this fantastic new tool put to work. At this point, we would like to ask for some audience feedback on what you heard today about eProject eXpress and have prepared three audience polls, which we'll bring up momentarily. We'll be using an interactive platform called Slido for polling today. If you could, please go to www.Slido.com using your mobile device or by opening a new window in your internet browser. Give folks a second to do that. And once you get the slide out, you'll see that there's an opportunity to enter an event code. If you could use #DOE, it will bring up this particular event and we'll soon launch those polls.

Again, we greatly appreciate your participation in these polls and providing us some very valuable feedback on eProject eXpress and what you heard today. So it looks like folks are starting to answer the first poll which is "What features of EPX will most benefit you?" We've got a list of about, I think, eight different options here, different features including: EPX allows me to produce reports of what I need when I need it; produce a single page project input template and there's complete flexibility on which fields to use; simplified to reduce time demands for data entry; new user-friendly single-page M&V results input template; added customizable fields that can be used for greenhouse gas jobs data; you can enter utility data in your choice of units; new checklist of recommended documents to store online; and a new state level rollup report.

Fantastic! We start to see poll responses here. It looks like out to an early lead is EPX's ability to produce reports of what I need when I need it. Let's give this about another 15 seconds. All right so it looks like ability to produce reports of what I need when I need it followed by simplified and reduced time requirement of ESCO data entry is another popular feature and then single-page project input template complete flexibility on which fields to use. Very helpful. Appreciate that feedback. Let's give this another 10

seconds and then, if we could, switch to the next poll. All right, thank you.

So our next poll question very open-ended. What additional features or enhancements to EPX would you like to see? This more of a long-form response. For example, if you were expecting to see or hear something today during the webinar that wasn't mentioned, let us know. Write it out. We are very interested in what that feedback is. Let us know what you were hoping to see or expecting to see that didn't come up today in our introduction to EPX. If there's additional features or enhancements that you would like to see added to EPX that you didn't see mentioned today, please let us know. Great, I see some responses regarding fields dedicated to GHG and economic impact, another comment about economic data or impact. Customized exporting of data to be shared with other agencies comes to the top here. Considerations of double entry of data is something else someone has raised. Very helpful. Thank you all for this feedback. Let's give this another 15 seconds or so, and then we'll switch to our third and final poll.

All right, our final poll is specific to EPX trainings, very simple. We would love to know if you would be interested in customized EPX trainings. Let us know. Really trying to get a sense of demand. Let us know if you have enough information now if you are interested in attending one of these customized trainings or maybe you would like to get to understand EPX a little bit more before you participate in one of these trainings or you have enough information to say you likely won't participate in training. This is very helpful for us as we consider what the next steps are and how to continue to do outreach and educate on this great new tool.

And I think we only need to provide another 10 seconds for this poll. I think it's a pretty quick one. It looks like folks want to go in and look at EPX first before registering for customized training, but nonetheless, this is very helpful. That's definitely an understandable position, so we appreciate that feedback. And, as I said, at the end here I'll share specific emails as well as, again, remind folks to attend the first training for EPX scheduled for August 11th, and that particular link is in the chat box. So thank you for participating in the polls. Your feedback is extremely valuable. Again, we will not be taking questions today but encourage you to visit the EPX webpage, attend the first training session in August or email Dale, Liz, Reid or myself with your questions, and emails will be posted again on the final slide.

For those of you looking to learn more about energy savings performance contracting and measurement and verification, please check out additional DOE resources. A great place to get started is DOE's ESPC Toolkit, which is a collection of over 30 tools and resources geared towards a state and local audience. The toolkit includes best practices and innovative approaches that states, cities and K through 12 schools have used to successfully establish and implement ESPC. And resources are grouped into the five stages of the ESPC decision-making process. This includes a section with resources on the value of integrating measurement and verification into your ESPC process and evaluating project results. The measurement and verification resources provided on this slide are a great place to learn more. Next slide, please.

As mentioned, this webinar is part of the 2021 Summer Webinar Series. We have a great lineup of presentations through August. Please visit the Better Buildings Solution Center to learn more about each and register. Next slide, please. We hope you will join us next Tuesday for our next webinar entitled "Workplace Evolution: Supporting Occupant Health While Achieving Energy Efficiency." This webinar will explore the connections between energy efficiency and occupancy health and unveil strategies for maximizing impact in the evolving commercial real estate market. Next slide, please.

To watch recordings from the Better Buildings Virtual Summit, the previous Better Buildings Webinar Series or technical presentations from our national labs, visit the on-demand webinars library where all previously recorded presentations are archived. Next slide. And with that, I'd be happy to give our audience some of their day back. First of all, I want to thank our panelists very much for taking the time to be with us today. Feel free to contact our presenters directly with additional questions you may have regarding EPX and the first EPX training scheduled for August. I encourage you to follow the Better Buildings Initiative on Twitter for all the latest news. And you will receive an email notice when the archive of this session is available on the Better Buildings Solution Center. So thanks, everyone, for your time today and have a great afternoon. Thanks, bye!

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