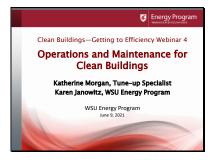
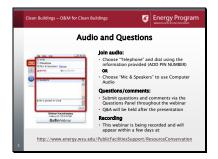
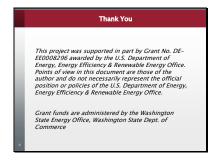
Slide 1



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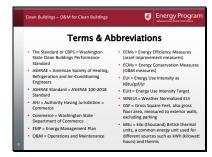
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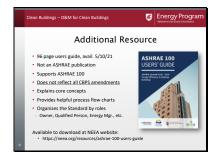
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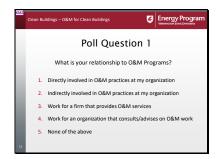


- This guide may be particularly helpful for those unfamiliar with many of the technical concepts referenced in the CBPS, as well as those not familiar with using ASHRAE guides.
- Appendix also includes useful checklists for applying Standard 100 and the O&M Program.
- There is a lot of information covered today, so our goal is to review the whole thing and some key items to keep in mind, but a resource like this will be helpful to dig into a review of some of the details.

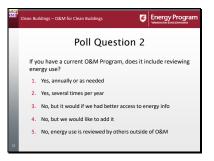
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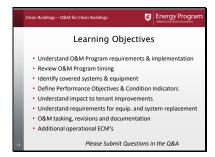
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- The O&M Program requirements are outlined in two different sections of the CBPS, section 6 and Normative Annex L.
- Informative Annex D, while not required, should be helpful in developing the O&M tasking that is required by the CBPS.
- Some of the defining documents, the Program Plan, like equipment list, goals, and tasks are listed as part of the EMP as well.

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- Most O&M programs focus on reliability and equipment life and tend to focus on maintenance tasks, such as filter changes, cleaning and lubrication. While these are components of the CBPS, the Standard's focus on energy efficiency means a much greater emphasis on developing, implementing and documenting operational tasks, which have a significant impact on energy efficiency.
- Most O&M programs as they currently exist should meet the maintenance program requirements with a few adjustments, but few are likely to meet the more comprehensive operational program requirements required by the CBPS.
- Emphasis on 'formal' guiding documents and protocol as well as record keeping. Since O&M programs often have a combination of staff and contractors, maintenance and controls contractors are common, and energy management might be another office/department or vendor – documents like this are useful to help coordinate and communicate among all these stakeholders.
- When a Tenant Improvement (TI) project is done, that information needs to be reviewed and brought into the documentation as well.

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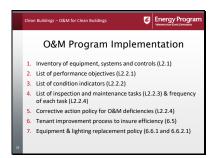
- In many cases where the owner has a net lease, the tenant is responsible for most building maintenance and utilities. In these cases, will the lease language contractually obligate the tenant to fulfill the owner's responsibility under the Standard?
- The owner or tenant will often hire a contractor to performance building maintenance tasks. Will the vendor also take on the operational tasks?
- What about review of the building's energy efficiency? The
 owner may need to contract additional consultants to complete
 efficiency tasking such as utility analysis, tenant improvement
 specifications and compliance. We will discuss TI impacts in
 more detail later in the webinar.

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- Most manufacturers provide detailed maintenance guidance for their respective equipment. However, systems made up of multiple equipment components (as is common with HVAC), and control systems maintenance may require additional tasking that is specific to the system and building. This may not be described by an equipment manufacturer, and will place a significant emphasis on building operations.
- Older buildings or buildings that were 'design build' or have undergone upgrades and tenant improvements will have some work to do to get a clear set of guidelines and operational tasking.
- Start by making an inventory of your systems and equipment.
 Then establish goals and objectives for your O&M program, including legal requirements, reliability, performance, equipment life, and safety and health.
- Inspection and maintenance tasks are intended to address operational parameters – more later but important to keep in mind the idea that operational functions are addressed through inspections and maintenance – eg inspecting the controls and maintaining the control set points at the desired level.

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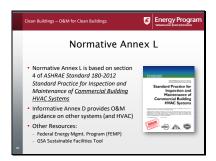
- We will take a closer look at which equipment needs to be included later in the webinar.
- Performance objectives can include energy efficiency objectives such as EUIt or Energy Star score, AND comfort objectives such as space temperature range or lighting levels; AND maintenance/repair/service life – these would inform condition indicators.
- Condition indicators identify when equipment is not operating within design specification and corrective action is required.
 This is highly defined in the Standard.
- We will take a closer look at inspection and maintenance tasking later in the webinar.

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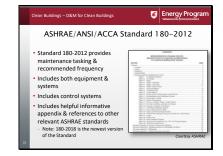
- As we discussed in webinar 2, Tune ups for Clean Buildings, the Tune up process is a great way to review and update the existing O&M practices, in preparation for meeting the more stringent O&M Program requirements specified by the CBPS.
- Many owners maintain high level O&M programs, however, few will comply with the requirements of the CBPS. Anticipate that you will have revisions, and additional documentation will be needed.
- Remember continuous improvement is the purpose so focus on that.

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- Additional resources are available through FEMP, the Federal Energy Management Program, and the US GSA Sustainable Facilities Tool. Both of these programs are open to everyone, not just Federal employees.
- GSA tools are also available in Energy Star Portfolio Manager so you can look for those resources when you are benchmarking.

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- HVAC only though, need to include other systems
- Annex D has some overlap with Section 5 but useful to review both, and Annex D includes other systems.
- Also note the appendices here sources of performance objectives and indicators of unacceptable conditions.

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- All significant energy-using equipment need to be included in the O&M Program, including the building systems listed. You will need to meet all of the elements of the standards on each of these systems.
- Nothing in the Standard prevents you from including additional systems and equipment into your O&M program, as needed.
- We encourage you to consider water and waste-related systems while you are at it ⊕ -
- Another resource is The Asset Score tool which provides a comprehensive list of elements and might be a good tool to use to gather information to input into the tool if you decide to do an asset audit that way.
- https://buildingenergyscore.energy.gov/documents/energy_as set_score_data_collection_form_full_long.pdf

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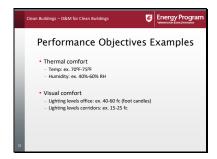
- Some of the components to include in the 'Program Plan' are listed here.
- Third bullet is where this really reflects typical Tune Up tasks.
- This is part of the program that overlaps somewhat with the EMP requirements – a summary of the Plan, location of the maintenance requirement record (or state of development might be included in annual updates as work is underway).

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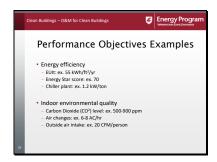


 The source for your objectives could be an original design specification, from an ASHRAE standard, building code, or other requirements by the AHJ, such as the CBPS EUI target. It can be an internal reference or externally driven.

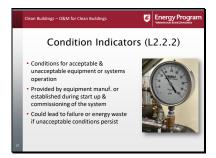
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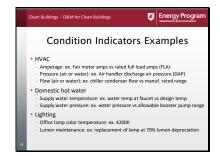


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- Condition indicators will also come from a variety of sources and will be specific to the equipment, systems and operation of each building.
- Also note that condition indicators are likely to change over time as equipment ages, and use or operation of the building changes.
- The goal here is to identify and measure condition indicators needed to keep equipment and systems operating reliably and efficiently.
- The CBPS provides specific guidance on investigating and taking action when unacceptable conditional indicators or unacceptable performance is found (L2.2.4).

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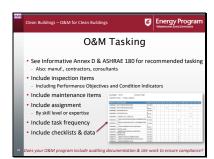
- Reminder: The building owner is responsible for meeting the EUI target.
- Mentioned this last webinar as one of the Energy Manager roles, as well as code compliance.
- TI's can have a significant impact on building energy use. Energy
 impacts from a TI can include changes in occupancy, changes in
 equipment, changes to building systems, changes to the
 building envelope, changes to needed maintenance, and
 changes to the building operating hours and other operational
 impacts.
- Building a formal TI process that includes specifications, preconstruction reviews, and documented commissioning, testing and balancing, will go a long way in avoiding the financial and managerial impact of noncompliance, including penalties, required audits, and additional building modifications needed to meet the EUIt.

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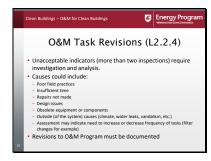
 O&M tasking involves a wide variety of activities, performed by a variety of individuals. In the context of the CBPS it's unlikely that a single individual will have the skills or time needed to meet all of the requirements. This will be a team effort.

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- Recommend you start with manufacturers minimum requirements, and customize from there.
- Revise tasking to include environmental impacts: Next to a dirty freeway, lots of cotton wood trees nearby, salt water, or extreme heat or cold, etc.
- Revise tasking to include variability of occupant operations:
 Amount of foot traffic, operations that produce dust or lint, extended operating hours, tenant filter spec's, etc.
- If scheduled component replacement is specified by the manufacturer, as is common with condensing gas boilers, include those in the tasking too.
- Experienced managers understand that completed tasking needs to be reviewed in the field and in documentation to ensure tasks are completed consistently and on time.

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- We refer to the O&M Program as a living document, requiring continuous revisions as conditions in and around the building change, and as equipment and systems age.
- Revisions to the documentation may include changes to performance and condition indicators, changes to tasks, revised frequency task frequency, and changes to skill level needed for the task.

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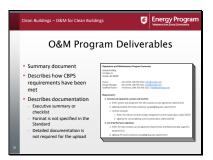
• This ties into the Energy Audit and Energy Management Plan.

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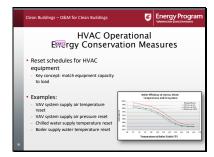


• Reminder – is there a mechanism to get this information from tenant-contractors to owner...?

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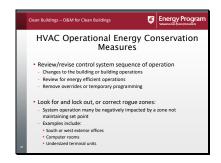


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 We wanted to ensure this webinar series provides actionable information. Here are some additional HVAC ECM measures that typically generate good energy savings here in the NW.

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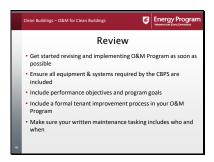
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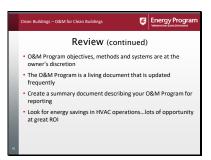


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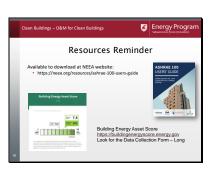
- Consider a Building Tune up to kick off your efforts. See our 2nd webinar for more details.
- Get a complete list of equipment and systems, and establish objectives and goals up front.
- Recognize that the O&M Program is a living document, build review and updating into your O&M tasking.

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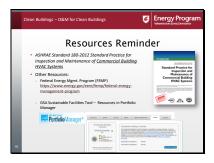
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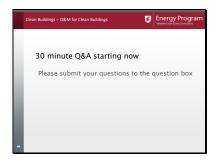
- This guide may be particularly helpful for those unfamiliar with many of the technical concepts referenced in the CBPS, as well as those not familiar with using ASHRAE guides.
- Appendix also includes useful checklists for applying Standard 100 and the O&M Program.
- This resource will be helpful to dig into a review of some of the details of the webinar.
- Building Energy Asset Score Integrated with Audit reporting in CBPS, free modeling tool to start evaluating improvements, can use to get started and if formal audit still needed will help reduce cost.

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- Additional resources are available through FEMP, the Federal Energy Management Program, and the US GSA Sustainable Facilities Tool. Both of these programs are open to everyone, not just Federal employees.
- GSA tools are also available in Energy Star Portfolio Manager so you can look for those resources when you are benchmarking.

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