
Program Sponsor Requirements For Building Performance with ENERGY STAR®



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Eligible Organizations: Energy Efficiency Program Sponsor ENERGY STAR Partners in the Commercial Buildings sector.

Partner Commitments

The following are the Program Requirements for Building Performance with ENERGY STAR (BPwES).

- A. ENERGY STAR Brand Requirements** – The Partner agrees to comply with all ENERGY STAR branding requirements as contained in the ENERGY STAR Partnership Agreement. The Partner is responsible for the proper use of the ENERGY STAR marks, as well as the proper use of the Building Performance with ENERGY STAR marketing graphic. The Partner agrees to submit all Web site designs and marketing materials developed for the partner's Building Performance with ENERGY STAR promotions to ENERGY STAR for review to ensure accuracy of ENERGY STAR marks used and consistency of the ENERGY STAR message.
- B. Program Plan Requirements** – The Partner agrees to develop and submit a Program Plan to EPA as follows:
1. Develop and submit a Program Plan to implement BPwES using the framework of program elements listed below and provided by EPA in the document, "Building Performance with ENERGY STAR: Program Framework." The Program Plan will describe the implementation of each program element. The Plan will discuss goals for program participation, approaches that will be used to market the program, and plans for providing training to all parties that will be interacting with customers.
 2. After the Partner submits a Program Plan, EPA will review the plan, make recommendations as appropriate, and work with the Partner to identify opportunities for cooperation in program design and/or implementation. Once the plan has been finalized, the Partner will be listed as a program participant.
 3. The Program Plan shall be updated as needed to reflect significant changes made by the partner.
- C. Program Design Requirements** – The Partner agrees to promote a strategic approach to energy management in existing commercial buildings, which includes benchmarking, whole-building assessments, and staged comprehensive upgrades. The goal of BPwES is to encourage cost-effective, energy-efficient enhancements to commercial buildings by promoting continuous improvement in whole-building energy performance, measured using EPA's ENERGY STAR Portfolio Manager. The program shall include the following elements, consistent with EPA's document "Building Performance with ENERGY STAR: Program Framework":
- **Target Marketing/Recruiting:** Target one or more of the vertically integrated market sectors covered by ENERGY STAR.
 - **Benchmarking:** Use benchmarking with EPA's Portfolio Manager as a gateway program requirement; facilitate access to energy data; and provide appropriate training and support services.
 - **Strategic Energy Management/Action Plan Development:** Provide education and guidance to program participants on the value of an integrated approach to improving building performance. Work with program participants to develop an Action Plan for improving the performance of their facility or portfolio of facilities.
 - **Whole-building Performance Assessment:** Conduct building performance assessments to identify opportunities for whole-building improvements. Encourage building managers to look at systems comprehensively, in order to identify savings from operations and maintenance strategies and occupant behavior, and to capture interactive savings between building systems.
 - **Whole-building Upgrades:** Develop strategies for increasing demand and supply for comprehensive building upgrade services, including engagement with trade allies to encourage the delivery of comprehensive services, and financial and other incentives to foster an integrated approach to building performance.
 - **Performance Monitoring and Verification:** Develop a performance monitoring and verification plan that validates program impacts, supports ongoing energy management through re-benchmarking and other efforts, and assesses customer satisfaction with the program.
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Program Quality Assurance (QA) Requirements – The Partner will address the following quality assurance (QA) considerations:

1. The Partner will develop a performance monitoring and verification plan that addresses customer satisfaction with the program and verification of program impacts. The plan should draw on and complement ongoing monitoring and verification as required by program regulators.
2. The Partner will work to ensure that service providers conducting building assessments (i.e. engineering firms, consultants, energy services companies, mechanical contractors) are committed to promoting whole building performance improvements and understand the goals of the BPwES program. Service providers should be familiar with ENERGY STAR tools and resources. The use of ENERGY STAR Service and Product Providers is strongly encouraged.
3. The Partner will ensure that all building assessments conducted are consistent with the guidance provided in the EPA Guidelines for Conducting Performance Assessments.
4. Partners are encouraged to use Portfolio Manager to ensure quality assurance of energy efficiency upgrades, by tracking the energy consumption of facilities that have received upgrades through the BPwES and re-benchmarking to verify energy performance improvements.

D. Program Data Reporting Requirements – The Partner will collect and share with EPA data sufficient to:

- Enable the evaluation of the program design by the participant;
 - Support revisions to the program framework;
 - Assist other ENERGY STAR Partners in understanding the benefits and costs of participation in BPwES.
1. The partner will collect for internal use and provide to EPA on a quarterly basis the following data:
 - a. Number of participating customers
 - b. Number of buildings and floorspace benchmarked
 - c. Number of completed assessments
 - d. Information on service provider involvement in the program

This information should be provided by April 30th for the first quarter, July 31st for the second quarter, October 31st for the third quarter, and January 31st for the fourth quarter.

In addition to quarterly reporting, an annual summary report should be prepared covering the calendar year. In addition to the participation metrics included in the quarterly reports, the annual summary should include when available: baseline energy use and energy performance benchmarks for participating buildings; predicted energy savings; and, post-project energy savings achieved and changes in energy performance benchmarks. This annual report should provide an overall qualitative summary of program activity for the year and discuss plans for the next year. This report should be less than three pages in length and be provided to EPA within two months of the end of the calendar year.

2. On an as-needed basis, EPA may request access to additional energy performance information that can be extracted from Portfolio Manager (e.g. electricity consumption, natural gas consumption, energy performance for different time periods) to conduct analysis on the effectiveness of the BPwES approach.

EPA Commitments

1. Provide guidance and technical assistance to help Partners launch their BPwES initiatives. EPA will assist sponsors by providing:
 - a. Prompt review (within five business days) of any Web site designs or marketing materials submitted to EPA for approval.
 - b. Rapid response to any Partner request for information or clarification on the requirements of the BPwES effort.
 - c. Cooperation in the development of Partners' program plans, including review, discussion, and constructive feedback.
 - d. Advanced training on the use of Portfolio Manager, including the setup of Master Accounts, providing and obtaining shared access to building benchmarking records, and the use of Portfolio Manager reporting functionalities.
 - e. Guidance and training for Partners regarding the development of customer Action Plans.
 - f. Training modules for service providers implementing whole-building assessments and upgrades.
 - g. Streamlined guidance and/or templates for reporting of program results.
 2. Make available the following ENERGY STAR program tools and resources:
 - a. ENERGY STAR Challenge Toolkit
 - b. US EPA ENERGY STAR Portfolio Manager online benchmarking tool
 - c. Benchmarking Starter Kit for building owners and managers
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- d. ENERGY STAR online training: live, pre-recorded and self-guided
 - e. Guidelines for Energy Management, strategic energy management approach
 - f. Building Upgrade Manual
 - g. Financial value calculators
 - h. Service and Product Provider directory
 - i. Guidelines for Conducting Performance Assessments
 - j. ENERGY STAR label for highest performing buildings
3. Provide ENERGY STAR Partners with public recognition for their involvement in BPwES.
 4. Disseminate program information, results and lessons learned from all Partners participating in BPwES, in a way that preserves proprietary information.
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To be completed by Partner participating in BPwES:

Organization Name: _____
Contact Name: _____ Email: _____
Address: _____ City/State/Zip: _____
Telephone: _____ Fax: _____ Web Site: _____
Major Metro Area(s) Served: _____

Partner agrees to work in good faith with EPA to meet the program requirements.

(printed name): _____

Title: _____ E-mail: _____ Phone _____

Signature: _____ Date: _____

If there is a change in the designated responsible party or contact(s) for this agreement, the Partner is required to notify ENERGY STAR within 30 days.

To be completed by ENERGY STAR representative:

Jean Lupinacci, U.S. EPA

Signature: _____ Date: _____
