|  |  |
| --- | --- |
| **[Building Name]**[street address][city, stat zip]Building Square Feet: xx,xxxPortfolio Manager ID: xxxxxxx |  |
| Baseline [mo/year] ENERGY STAR® Score:  | xx |
| Current [mo/yearr] ENERGY STAR Score:  | xx |
| [mo/year] Energy Reduction Goal: | x % |
| Current Site EUI [mo/yr] kBtu/sf | xxx |
| Current [mo/yr] Progress towards Goal: | xxx |
| Anticipated Cost Savings of reaching Goal: | $ xxx,xxx |

**ENERGY TEAM**

**Property Manager:** [name, firm]

**Building Engineer:** [name, firm]

**Energy Trust Account Manager:** name PH: xxx-xxx-xxxx e: \_\_\_@energytrust.org

**Energy Coach:** name PH: xxx-xxx-xxxx e: \_\_\_@\_\_\_\_.com

**OVERVIEW**

This document—the Project Bank—is an action plan to support the Property Team at the [building name] achieve its energy reduction goal. Action items may include operational and maintenance improvements, capital investments, staff training, recommended further analysis, tenant engagement or other behavior change efforts, or third-party service provider proposals. The Project Bank conveys to both the Property Team and building owners and senior management the planned activities, status, and energy performance of the property. The Property Team should review, take action and update this document quarterly and present to ownership and/or management for discussion, comments and approval.

| **No.** | **PROJECT DESCRIPTION***As Prioritized by Property Team* | **Planned Implementation Date**(Month, Year) | **Budget or Resources Approved**(Y/N or NA) | **Status**(Date Completed or Anticipated to be Completed. If Delayed indicate reason) | **Incentives/ Resources**(See following pages) |
| --- | --- | --- | --- | --- | --- |
| 1 | Input energy consumption and cost data into Portfolio Manager. Utilize Target Finder to set EE goals and document energy savings. | Quarterly | NA | Ongoing | 15 |
| 2 | Perform nightwalks to identify energy losses due to equipment operating during unoccupied hours or envelope leakage. | Monthly |  |  | 11 |
| 3 | (example ongoing project) Turn off HVAC after-hours\* | Ongoing | NA | Ongoing | NA  |
| 4 | (example one time project) |  |  | 2013 | 3 |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |
| 9 |  |  |  |  |  |

\* Refer to Scoping Study dated xx/xx/xxxx and Energy Trust audit dated xx/xx/xxxx for detailed description.

\*\* May qualify for Custom Efficiency, please discuss with Energy Trust.

## Management Review

I have reviewed the Energy Reduction Goal, and authorize the Property Team at [building name] to proceed in assessing, budgeting, implementing, and reporting on the proposed actions detailed in this Plan.

|  |  |  |  |
| --- | --- | --- | --- |
| NAME |  | SIGNATURE |  |
| TITLE |  | DATE |  |

Manager’s Review Comments:

## Key Terms

**Energy Reduction Goal**: Targeted amount of energy savings the Property Team is seeking to achieve by a certain date. This can be expressed as a percentage reduction in energy use or improvement in ENERGY STAR® score, or other concrete and measureable descriptions of building energy use.

**Current Progress towards Goal**: Energy savings achieved towards the Energy Reduction Goal as of the month this report was updated. Progress is stated in the same format as the Energy Reduction Goal (% reduction or ENERGY STAR score).

**Anticipated Cost Savings**: Approximate dollar amount of energy savings expected to result from meeting the Energy Reduction Goal, as calculated in Portfolio Manager Target Finder or other estimate.

**Resources**

|  |  |
| --- | --- |
| Financial Incentives  |  |
| 1 | **Energy Trust of Oregon**  | http://energytrust.org/business/ |
| 2 | Equipment Upgrades and Remodels | http://energytrust.org/commercial/equipment-upgrades-remodels/ |
| 3 | Lighting + Lighting Controls | http://energytrust.org/commercial/incentives/equipment-upgrades-remodels/LightingAndLightingControl/LightingandLightingControl/ |
| 4 | Heating + Cooling | http://energytrust.org/commercial/incentives/equipment-upgrades-remodels/HeatingAndCooling |
| 5 | Insulation | http://energytrust.org/commercial/incentives/equipment-upgrades-remodels/Insulation/Insulation2/ |
| 6 | Major Renovations and Tenant Improvements  | http://energytrust.org/commercial/construction-renovation-improvements/ |
| 7 | **Clark Public Utilities**  | http://www.clarkpublicutilities.com/index.cfm/your-business/business-conservation-programs/ |
| 8 | Commercial Lighting Incentive Program CLIP  | http://www.clarkpublicutilities.com/index.cfm/your-business/business-conservation-programs/clip/ |
| 9 | Custom Energy Efficiency Improvement Projects | http://www.clarkpublicutilities.com/index.cfm/your-business/business-conservation-programs/custom-projects/ |
|  | *Also see below Tools & Best Practices – Clark Public Utilities Automated Benchmarking Service* |
| 10 | **Portland Development Commission** | http://www.pdc.us/for-businesses.aspx |

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| --- | --- |
|  Tools & Best Practices |  |
| 11 | Top 5 Most Common Energy Saving Opportunities, NEEA Betterbricks | <http://www.betterbricks.com/building-operations/tools/common-opportunities-top-five#TheTopFourSavingsOpportunities> |
| 12 | Lighting Best Practices Tip Sheets, NW Lighting Network | http://nwlightingnetwork.com/best-practices/tip-sheet |
| 13 | Guide to Energy Efficiency Lighting (pdf) | http://energytrust.org/library/GetDocument/2464 |
| 14 | Energy Studies in Buildings Laboratory, University of OR  | http://pages.uoregon.edu/esbl/ESBL\_website/splash\_pages/ESBL\_home.php |
| 15 | ENERGY STAR Portfolio Manager  | <http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager> |
| 16 | Clark Public Utilities Automated Benchmarking Services | http://www.clarkpublicutilities.com/index.cfm/your-business/automated-benchmarking-service/ |
| 17 | Symptom Diagnosis Tool, NEEA Betterbricks | <http://www.betterbricks.com/building-operations/tools/symptom-diagnosis-tool-0> |
| 18 | Sustainability at Work, City of Portland - Green Your Business | http://www.sustainabilityatworkpdx.com/green-your-business/how-to/ |

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| Training & Professional Development |
| 19 | BOMA Oregon Professional Development | http://www.bomaportland.org/events/ |
| 20 | Building Operator Certification  | <http://www.theboc.info/> |

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| Certification |
| 21 | ENERGY STAR, EPA | [<http://www.energystar.gov>](http://www.bomaboise.org/index.php?option=com_content&task=view&id=78&Itemid=147) |
| 22 | LEED EBOM, USGBC | <http://new.usgbc.org/leed/rating-systems/existing-buildings> |
| 23 | Sustainability at WorkCity of Portland | http://www.sustainabilityatworkpdx.com/ |

*See additional resources and tools at:*

**Kilowatt Crackdown website** <http://www.kilowatt-crackdown.com/portland/resource-library>

**BetterBricks.com** <http://www.betterbricks.com/building-operations/tools-and-technical-advice>