

FEDERAL UTILITY PARTNERSHIP WORKING GROUP SEMINAR

May 2-3, 2019
San Diego, CA



eProject Builder and UESCs

Elizabeth Stuart, Lawrence Berkeley Lab

Hosted by:





eProject Builder (ePB) Overview

- Secure, web-based project tracking/reporting system
- Free tool maintained by Berkeley Lab for U.S. DOE
- ePB enables agencies and utilities to securely:
 - Preserve and track UESC project information, performance assurance information, and related documents in perpetuity
 - Develop project scenarios using standardized calculations
 - Generate data and reports
- Status: contains ~780 projects; 60% fed, including 18 UESCs



The Power of Data Management

- Institutionalizes ability to report program & project impacts; enables you to be *audit-ready*
- Demonstrates the *value* of projects and programs
- Enables fulfilment of reporting requirements
- Identifies where work has been completed and where remaining potential exists
- Identifies savings achieved year over year
- Illustrates that benefits are being achieved in similar projects (by folks just like you)



ePB Benefits

- **Enables UESC teams** to leverage the power of data management
- **Preserves your critical project data** through the contract term and beyond
- **Standardizes the types of data collected and reported** for UESC projects – very important
- **Enables tracking persistence of realized savings** year over year
- **Enables analysis and reporting** of project / program performance; enables you to tell your success stories!
- **Empowers UESC teams** by providing them direct access to data for their portfolio of projects
- Forthcoming: **Enables transfer of data from ePB to CTS** (pilot underway)



ePB Components and Security

- **Two Key System Components**
 - Excel-based data template for utility/contractor to enter data and develop project scenarios
 - Online system where data & documents are uploaded, accessed & tracked
- **Security Features**
 - Encrypted (https) and 2-step log-in similar to other secure sites
 - Project access restricted to one customer and one utility account
 - Zero cyber security risk score via 2 levels of security testing/remediation
 - National Lab IT security scans and other processes
 - 3rd-party scans from government cyber security expert



ePB User Roles

Customer “Project Initiator”



- Registers
- Initiates project (takes less than 1 minute)
- Reviews project data
- Approves submitted project
- Unlocks project for revision, if necessary
- Invites Project Viewer(s)

Utility “Project Builder”



- Registers
- Enters project data
- Reviews project data with customer
- Submits project for approval
- Revises project data, if necessary
- Invites Project Viewer(s)

Other Stakeholder “Project Viewer”

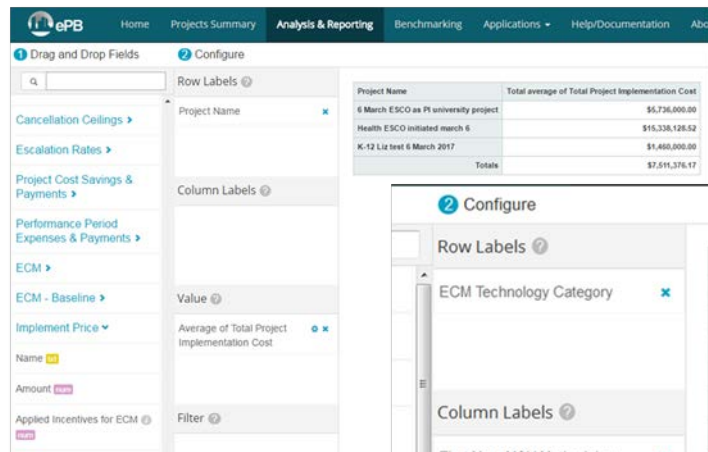


- Registers
- Views project information, only when invited



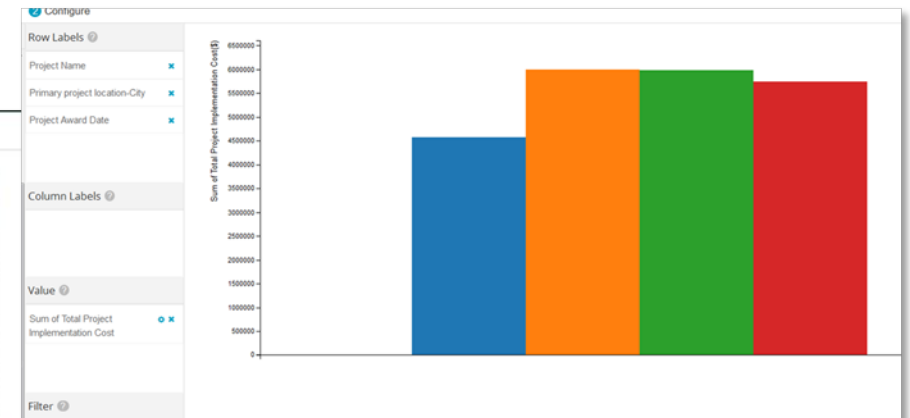
ePB Outputs

- Project financial/savings schedules
- Annual and cumulative performance verification reports
- Start with library canned queries or create your own
- Tables and graphs with analysis on portfolio of projects



The screenshot shows the ePB interface with the 'Configure' tab selected. The 'Row Labels' section contains 'ECM Technology Category'. The 'Column Labels' section contains 'First Year M&V Methodology'. The table displays data for various ECM categories and their associated M&V methodologies:


ECM Technology Category	First Year M&V Methodology	Option A	Option B	Option C	Option D	Totals
Boiler Plant Improvements			1			1
Building Envelope Modifications				1	2	3
Chilled Water, Hot Water, and Steam Distribution Systems			1			1
Chiller Plant Improvements			3			3
Lighting Improvements		3	1			4
Renewable Energy Systems			3	1		4
Totals		3	9	2	2	16





Registration and Log In

[Benchmarking](#) [Help/Documentation](#) [About](#)



eProjectBuilder

ePB enables energy service companies (ESCOs) and their customers to securely:

1. Upload, track and access ESPC project-level information for the life of the performance contract
2. Quickly generate data for project and portfolio reports
3. Develop project scenarios using standardized amortization calculations
4. Benchmark new ESPC projects against historical project data

[Learn more](#)

Step 1: Please sign in

Email:

Password: [Forgot password?](#)

[Sign in](#)

New to ePB? [Request an Account](#)



Registration Page

eProject Builder Account Registration Form

Required fields are indicated with an asterisk*

Contact Information*

First Name:

Last Name:

Title:

Organization:

Address:

City:

Office Email Address:

Zip:

Phone Number:

How Will You Be Using eProject Builder?*

Select One

Accounts Being Requested*

Please check all that apply

- ☐ ePB main site - to enter real project data
- ☐ ePB training site - to explore the tool and enter test data

Would you like to be invited to upcoming training webinars?

Yes

Market Segment(s) You Work In

Please check all that apply

- ☐ Federal Government
- ☐ State/Local Government
- ☐ Healthcare
- ☐ K-12 Schools
- ☐ University/College
- ☐ Industrial
- ☐ Commercial (Leased)
- ☐ Commercial (Owner-occupied)
- ☐ Public Housing
- ☐ Residential
- ☐ Retail (Leased)
- ☐ Retail (Owner-occupied)
- ☐ Hotel/Hospitality
- ☐ Other


Register for account on main site, training site or both:

<https://eprojectbuilder.lbl.gov/>

2nd email is required for training site; user receives both ESCO and customer type roles to explore complete project entry and approval cycle








Projects Summary Page - View Portfolio

 [Home](#) [Projects Summary](#) [Benchmarking](#) [Help/Documentation](#) [About](#) Liz Test Customer ▾

[+ Enter New Project](#) [Download Project Template](#) [Download All Projects in Table as .csv](#)



- To **view** project data online, click the project name.
- To **download** a draft output schedule for pre-approved or approved projects, click the gear icon and the "download schedule" link.
- To **manage** names of who can view the project, click the gear icon and the "manage viewers" link.

Search:

Project ID	Project Name	Market	Agency	Award Date	Last Modified	Customer	ESCO	Total Implementation Cost	Total Guaranteed Savings	Proposal Status	M&V Status	Data % Complete	Actions
52204	Nov 19 demo project	Federal Government	State		2015-11-19 19:48:48	test Customer Organization	ESCO Company name	\$7,082,480	\$8,689,789	Pending		100%	
52205	LBNL test project 3	Federal Government	Office of Science		2015-11-25 16:36:59	Berkeley Lab	ESCO of the West	\$3,562,480	\$5,006,332	Pre-Approval		100%	
52203	Demo project November	Federal Government	State		2015-11-30 20:35:11	Demo Customer	Demo ESCO	\$5,882,480	\$7,378,885	Approved	Pending	100%	
52213	December Test Project II	K-12 Schools	Office of Science		2015-11-30 20:14:19	LBNL	Demo ESCO	\$7,682,480	\$10,088,917	Approved	Pending	100%	
52212	Dec 1 demo	K-12 Schools			2015-11-30 18:07:23			\$0	\$0	Pending		0%	

Showing 1 to 5 of 5 entries


← Previous 1 Next →

 Energy Efficiency & Renewable Energy 

If you have questions, issues or feedback on eProject Builder please email: epb-support@lbl.gov



Project Dashboard

[Home](#) [Projects Summary](#) [Benchmarking](#) [Help/Documentation](#) [About](#) Liz Test Customer ▾

[Project Summary](#)

Demo project November

Location: **Berkeley, CA**
Customer: **Demo Customer**
ESCO: **Demo ESCO**
Award Date:
Implementation Cost: **\$5,882,480**
Your Role: **Project Initiator**

Action Menu

- [View Project Details](#)
- [Edit M&V Data](#)
- [View Project Financial Schedules \(html\)](#)
- [View Project Financial Schedules \(.pdf\)](#)
- [Manage Project Participants](#)
- [Download blank data template](#)

Project Status



Your approved project has one or more M&V years in pending status available for the ESCO to submit.

[View / Approve M&V Data](#)

Project Financial Schedules Archive

- Nov 25, 2015 04:50:04 pm PST
- Nov 25, 2015 04:39:49 pm PST

Documents

File Name	Date Uploaded	File Size
ePB Project Contact List.docx	11/30/2015 6:15:34 pm PST	11.10 KB 
ePB Test Upload Document.docx	11/30/2015 6:17:04 pm PST	11.10 KB 
Total Disk Usage		22.20 KB

[Upload a Document](#)

If you have questions, issues or feedback on eProject Builder please email: epb-support@lbl.gov



Excel-based Data Template

SUMMARY SCHEDULE BASIC PROJECT INFORMATION					
Project Contact Information	Role:	Institution:	Name:	Email:	Phone:
	Project Facilitator, if applicable				
	Customer (Project Initiator)				
	ESCO (Project Builder)				
	Finance Specialist				
	Primary Financier				
Project Identification & Characteristics	Project Identification:		Project Characteristics:		
	Task Order #, if applicable		List of Sites in Project (separated by commas):		
	Contract #		Number of Buildings in Project:		
	Project Name:		List of Buildings in Project (separated by commas):		
	Primary Project Location-City:		Market Segment:		
	Primary Project Location-State:		Total Floor Area Affected by Project (Square Feet):		
	Primary Project Location-S zipcode:		Average Annual Energy Consumption of Affected Buildings (MMBtu/yr):		
	Agency Name (optional):		Implementation Period (months):		
	Project Initiator (Customer)				
	ESCO Name (Project Builder)				
Costs & Financials	Financing Terms:		Project Capitalization:		
	Applicable Financial Index:		Total Implementation Price (from Schedule-2 Total):	\$0	
	Contract Term (years):	0	PLUS Financing Procurement Price-capitalized construction period interest (\$):		
	Index Rate:		PLUS Financing Procurement Price-other expenses (\$):		
	Added Premium (adjusted for tax incentives):		LESS Implementation Period Payments (from Schedule-1, (c)):	\$0	
	Project Interest Rate:	0.00%	Total Amount Financed (Principal):	\$0	
	Financing Issue Date (mm/dd/yyyy):		Performance Bond Amount:		
	Source (financier):		Annual Dollar Savings Retained by Customer:		
	Effective Through (mm/dd/yyyy):				
	Primary Type of Financing (choose from list):				
Other Information	Project Agreement Type (choose from list):				
	Payment Timing (beginning or end of performance year):				
	Guarantee % of Estimated Savings:				
	Federal Contract Type:				
	Primary Electric Utility:				
	Primary Natural Gas Utility:				
	Primary Water Utility:				

SCHEDULE #1 COST SAVINGS AND PAYMENTS			
Implementation Period:	(a)	(b)	(c)
	Estimated Cost Savings	Guaranteed Cost Savings	Payments
Performance Period (Year):	(d)	(e)	(f)
	Estimated Annual Cost Savings	Guaranteed Annual Cost Savings	Annual Payments
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
Total Performance Period:	\$0	\$0	\$0
Total Implementation & Performance Period		Total Guaranteed Cost Savings (b+e)	Total Payments (c+f)
		\$0	\$0

Excel-based data template for utility and agency to:

- 1) Develop project scenarios
- 2) Enter project data for uploading to the online system

There are two different template versions:

- 1) **Default:** automates calculations of payment and savings schedules
- 2) **Override:** manual entry of all data



ePB and UESC

- Berkeley Lab is enlisting your input today on a Beta version of a new ePB data template
 - Current USEC projects in ePB have had to use workarounds
 - New version will fully align with UESC project structure



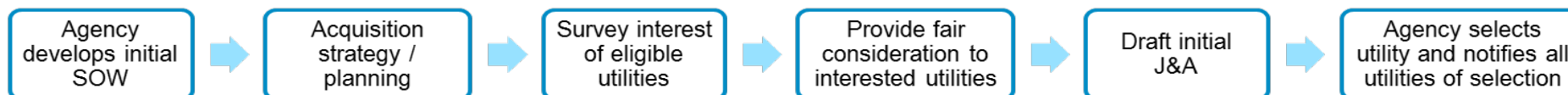
ePB and UESC

OVERARCHING DOCUMENTS

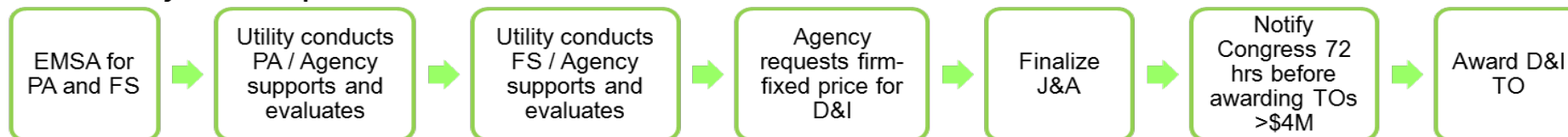


TASK ORDER AWARD FOR UESC

STEP 1: Acquisition Planning

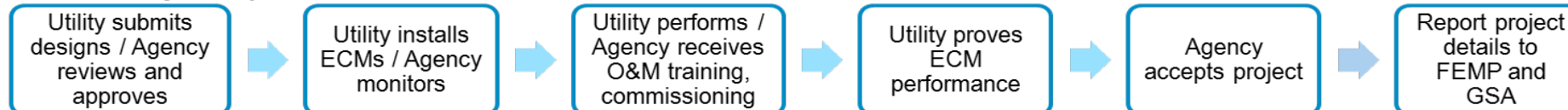


STEP 2: Project Development

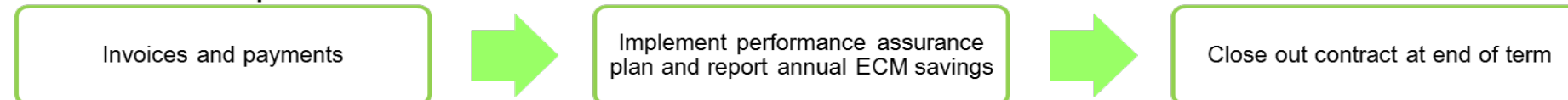


IMPLEMENTING THE TASK ORDER

STEP 3: Project Implementation



STEP 4: Post-Acceptance



Agency initiates project in ePB at start of Step 3.

Utility can develop scenarios w/ePB template



UESC Template Demonstration

A	B	C	D	E	F	G
20	Project ID #					
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						
43						
44						
45						
46						
47						
48						

A	B	C
1	SCHEDULE #1u	
2	COST SAVINGS AND PAYMENTS	
3		
4	Implementation Period (Year 0)	(a)
5		Estimated Cost Savings*
6		
7	Performance Period (Year)	(d)
8		Estimated Annual Cost Savings
9	1	
10	2	
11	3	
12	4	
13	5	
14	6	
15	7	
16	8	
17	9	
18	10	
19	11	
20	12	
21	13	
22	14	
23	15	
24	16	
25	17	
26	18	



Q&A

- Challenges around preserving and accessing UESC project information, e.g., for:
 - Reporting, tracking what has been implemented, sharing success stories
- Challenges around tracking performance assurance
- Training materials that will be most useful
- Other questions



Thank you!

- **Website:** eprojectbuilder.lbl.gov
- **Introductory training webinars (all project types)**
 - 2nd Thursday and 4th Tuesday of every month in 2019 @ 1:00 eastern
 - See the ePB Help/Documentation page for upcoming webinars:
<https://eprojectbuilder.lbl.gov/home/#/help>
- **Technical support:** epb-support@lbl.gov
- **Contact:** Elizabeth (Liz) Stuart: estuart@lbl.gov