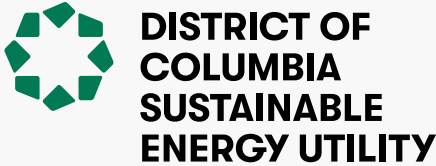
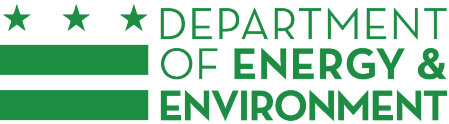


As you join, please remain on mute and consider taking our welcome poll.

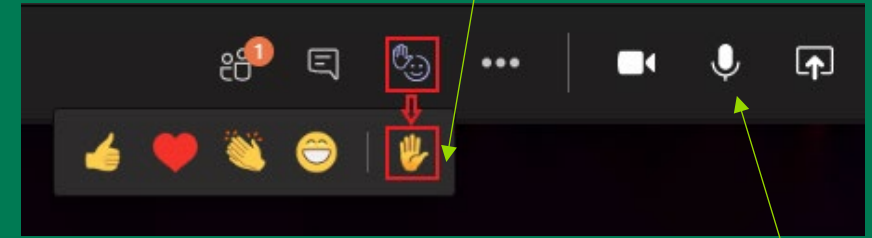
Condo & Co-op BEPS Toolkit Info Session



Session Expectations

- Please note that there will be polls throughout today's session. All responses unless otherwise noted are anonymous.
- There will be one Q&A section where discussion is open for 15-20 mins.
- Please let us know in the chat section if you are having technical difficulties or difficulty hearing the presentation.
- To submit a question, please use the chat/Q&A to write out your question or use the 'raise hand' feature (see photo). Once your hand is raised the moderator will call on you to come off mute to give an auditory response
- The webinar will be posted on the DCSEU website for anyone wanting to review the information discussed today.
- We will pause recording during the Q&A sections.
- If we are not able to get to all questions, please post them to the chat and we will work to get back to you.

Raising Your Hand

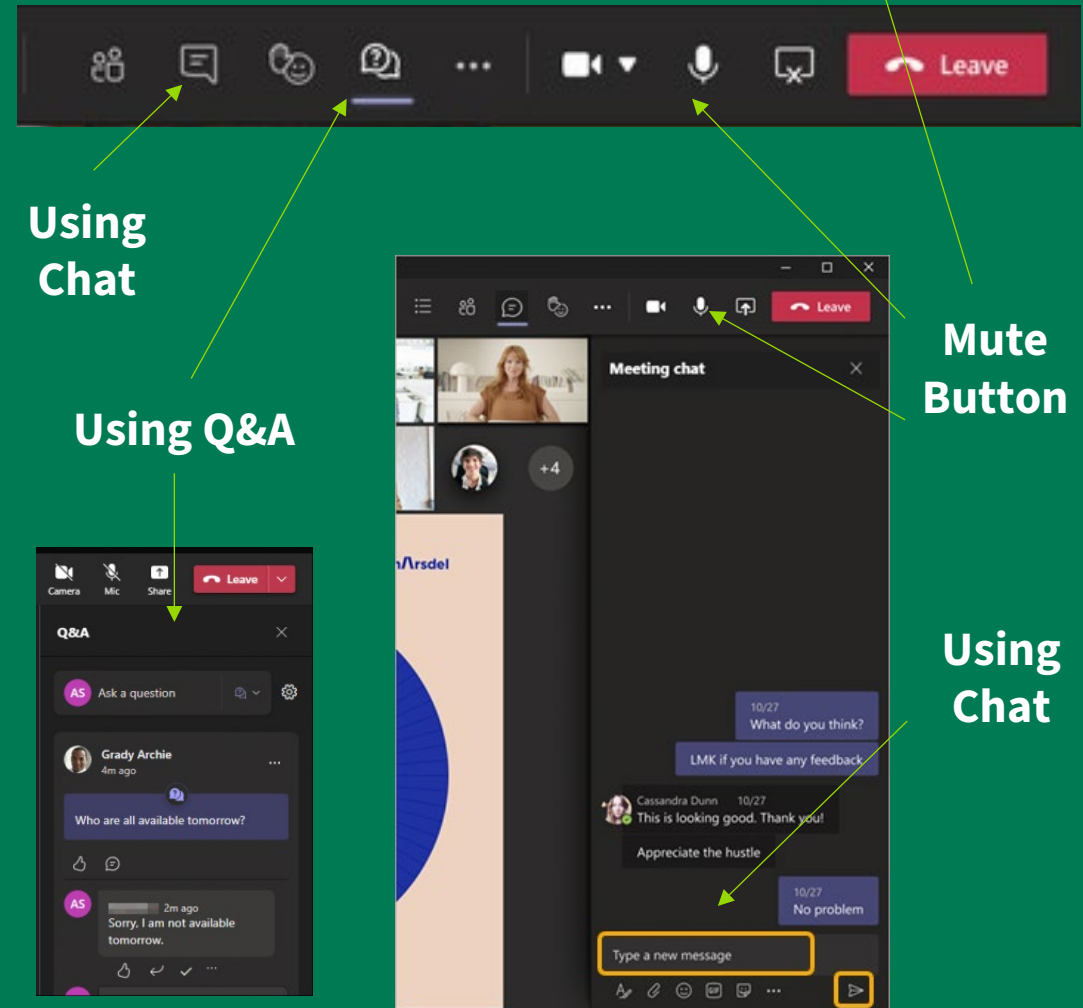


Using Chat

Using Q&A

Mute Button

Using Chat



Info Session Agenda

Welcome & Introduction

- Katie Bergfeld, DOEE Building Performance & Enforcement Branch Data & Benchmarking Division
- Patti Boyd, Director, Technology and Innovation

Building Innovation Hub – Toolkit Walkthrough

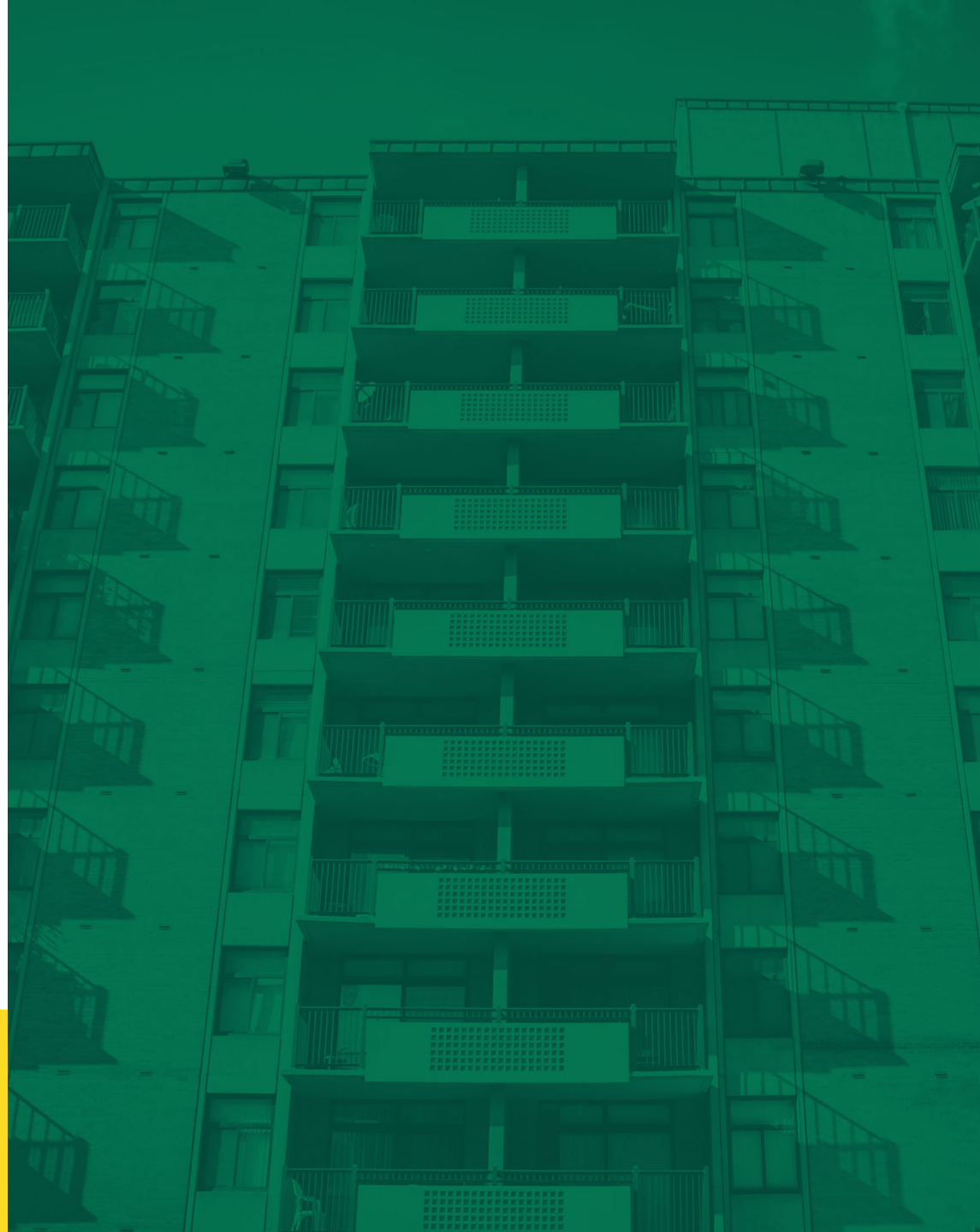
- Yolanda Bonner, Associate Director of Building Performance

Co-ops, Condos, & the DCSEU

- Patti Boyd, Director, Technology and Innovation

Katie Bergfeld

DOEE Building Performance & Enforcement Branch Data &
Benchmarking Division



Patti Boyd

DCSEU Director, Technology and Innovation

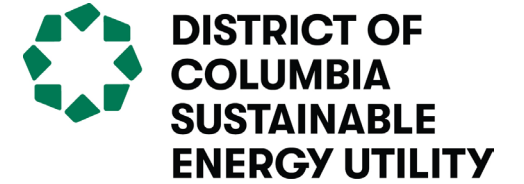


About the DCSEU

The District of Columbia Sustainable Energy Utility (DCSEU) is a community-minded organization committed to making energy efficiency and clean energy more accessible to every person and business in the District. Since 2011, we have helped District residents and business generate more than \$1.4 billion in lifetime energy cost savings. We provide the industry-leading learning opportunities, expert hands-on assistance, and vital financial support that save our communities both energy and money.



DCSEU Goals



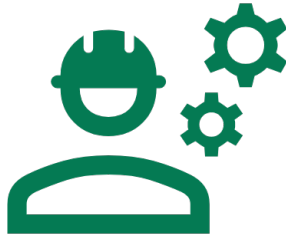
CO₂



Reduction in
Energy,
MTCO₂e



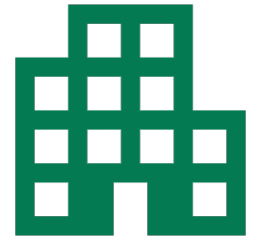
Green
Jobs



Local Economic
Development



Low-Income
Spending



Renewables
with EE



Deep Energy
Retrofits



Yolanda Bonner

Associate Director of Building Performance





Condominium and Cooperative BEPS Toolkit

February 27, 2025

Our team



Theresa Backus
Director,
Building Innovation
Hub



Mary Thomas
Associate Director,
Building Innovation
Hub



Yolanda Bonner
Associate Director
Building
Performance,
Building Innovation
Hub



About us

The Building Innovation Hub, a project of IMT, helps building industry professionals in and around Washington, DC create and operate high-performing buildings. The Hub connects professionals and provides information and programming.

The goal of the Hub is to meet the current needs of the building industry while simultaneously pushing the industry towards the innovative solutions that we will need to build and operate high-performing buildings.

A program of the Institute for Market Transformation

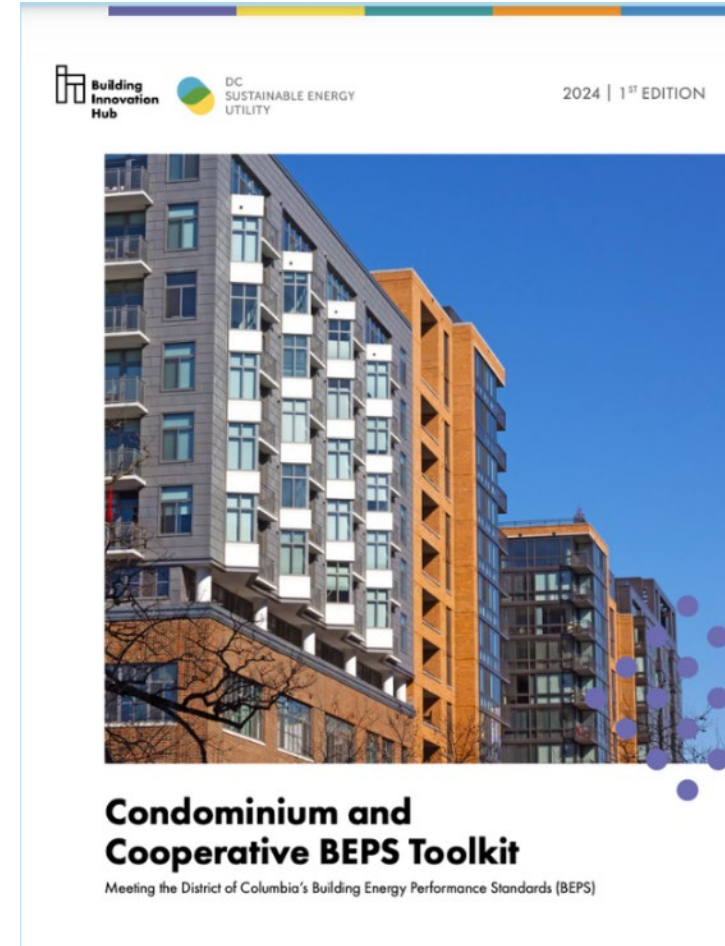


Introduction to BEPS & Toolkit

Purpose of the toolkit

- Tips for condo and co-op buildings to meet the BEPS
- How to approach the BEPS in a way that is not overwhelming
- How to create a plan for your building
- Where you can find funding & financing options
- What to do if something goes wrong, if you need more help as well as if you need additional time from the District
- Helpful language to use when hiring a contractor or consultant

Our companion PowerPoint deck has sample slides to share with your board and other stakeholders.



Introduction to BEPS & Toolkit

How to use the toolkit

- The left side has valuable information on the specific topic, including links to find additional information.
- The right side has an Action Plan checklist that includes a place to enter the name of the person responsible for completing the checklist action and date it was completed.

SECTION 1: LEARN ABOUT BEPS

Learn About Benchmarking and Your Building(s)

50k+ sq. ft. condo/co-op buildings


10k+ sq. ft. condo/co-op buildings

Overview

Benchmarking and BEPS are separate requirements in the District, but they are related. Energy benchmarking is the process of measuring a building's energy performance and comparing it against peer buildings and its own past performance. Before you can determine your BEPS plan, you need to know about your building's energy performance and how to benchmark that data. This is the data that the District uses to determine whether your building already meets the BEPS or you need to enter a BEPS compliance cycle and possibly make improvements to the building.

Buildings are subject to [benchmarking](#) based on their [floor area](#).


If you are required to benchmark your building, you must track your energy and water use annually using [ENERGY STAR® Portfolio Manager](#) and report it to the Department of Energy and Environment (DOEE) by April 1 of each year. For information on how to set up the Portfolio Manager account for your building, reference [DOEE's Benchmarking FAQs](#) and [ENERGY STAR's FAQs](#).



Private Buildings
≥50,000 sq. ft.

Have been benchmarking since CY 2013


BEPS Cycle started Jan. 1, 2021



Private Buildings
≥25,000 sq. ft.

Required to start benchmarking during CY 2021


BEPS Cycle starts Jan. 1, 2027



Private Buildings
≥10,000 sq. ft.

Required to start benchmarking during CY 2024

BEPS Cycle starts Jan. 1, 2033



Ensure the contact information in the account is current and that the person listed is able to receive and respond to communications from DOEE. You may enter the building's data yourself, or you may hire an outside entity to manage the account.

Third-Party Benchmarking Requirement

Once every three years starting in 2024, buildings that are required to benchmark their energy use must also have the data verified by a third party. Although benchmarking is required annually, the verification of that data is required every three years. You can learn more about this requirement, and who can qualify as a Third-Party Data Verifier (cannot be the same entity described above who manages the Portfolio Manager account), on [DOEE's website](#).

Benchmarking Action Plan Checklist

Name: _____ Date Completed: _____

See [Benchmarking Checklist](#) in Appendix for full action plan.

☐

Inform the board and unit owners of the building's benchmarking status.

- Are you required to benchmark?
- Have you already benchmarked?
- Do you have your ENERGY STAR score?

☐

Determine your building's gross floor area.

☐

Determine how to access the building's energy and water data.

☐

Create an [ENERGY STAR Portfolio Manager account](#) for the property.

☐

Gather the needed data, and link your [DC Real Property Unique ID](#) (this is usually your SSL/SSR or the condo association's number).

☐

If individual residents pay for electricity or gas use at the unit level, request aggregated whole-building data from [Pepco](#) and [Washington Gas](#), and connect the building's account to Pepco and Washington Gas systems.

☐

Enroll in DOEE's [automatic annual reporting](#), which will automatically update the monthly energy and water consumption data.

☐

In years where verification is required, hire a [Third-Party Data Verifier](#), and grant ENERGY STAR Portfolio Manager account access to the third-party verifier.

☐

Ensure a verifier completes their review of the energy data, adds verification information to Portfolio Manager, and makes all required changes in Portfolio Manager.

5

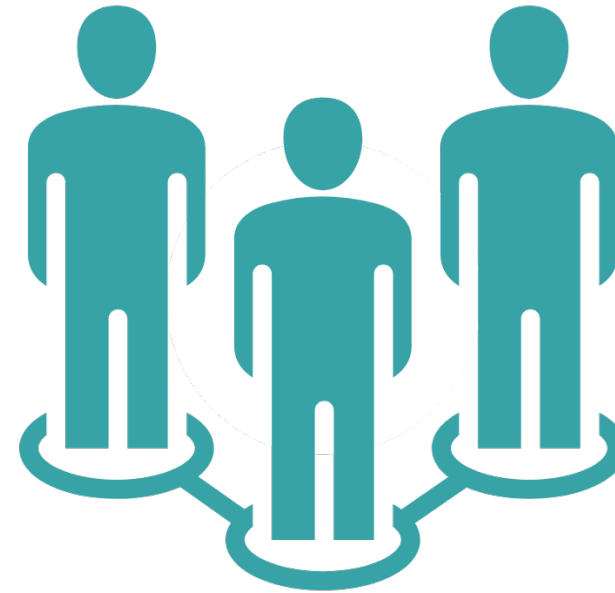
6

Who Is the Toolkit For?

Target audience and key stakeholders

Target Audience

- Condo and co-op owners
- Property managers
- Boards and decision-makers
- Tenants



1 must meet the Building Energy Performance Standard (BEPS) Period 1 (which covers private buildings 50,000 square feet and up, including condo and co-op buildings).

2 must meet future BEPS compliance cycles, which cover private buildings 10,000 square feet and up, including condo and co-op buildings.



Look for these circles to determine whether a section applies to you.





Learning about BEPS

What is it

What is Building Performance Standard (BEPS)?

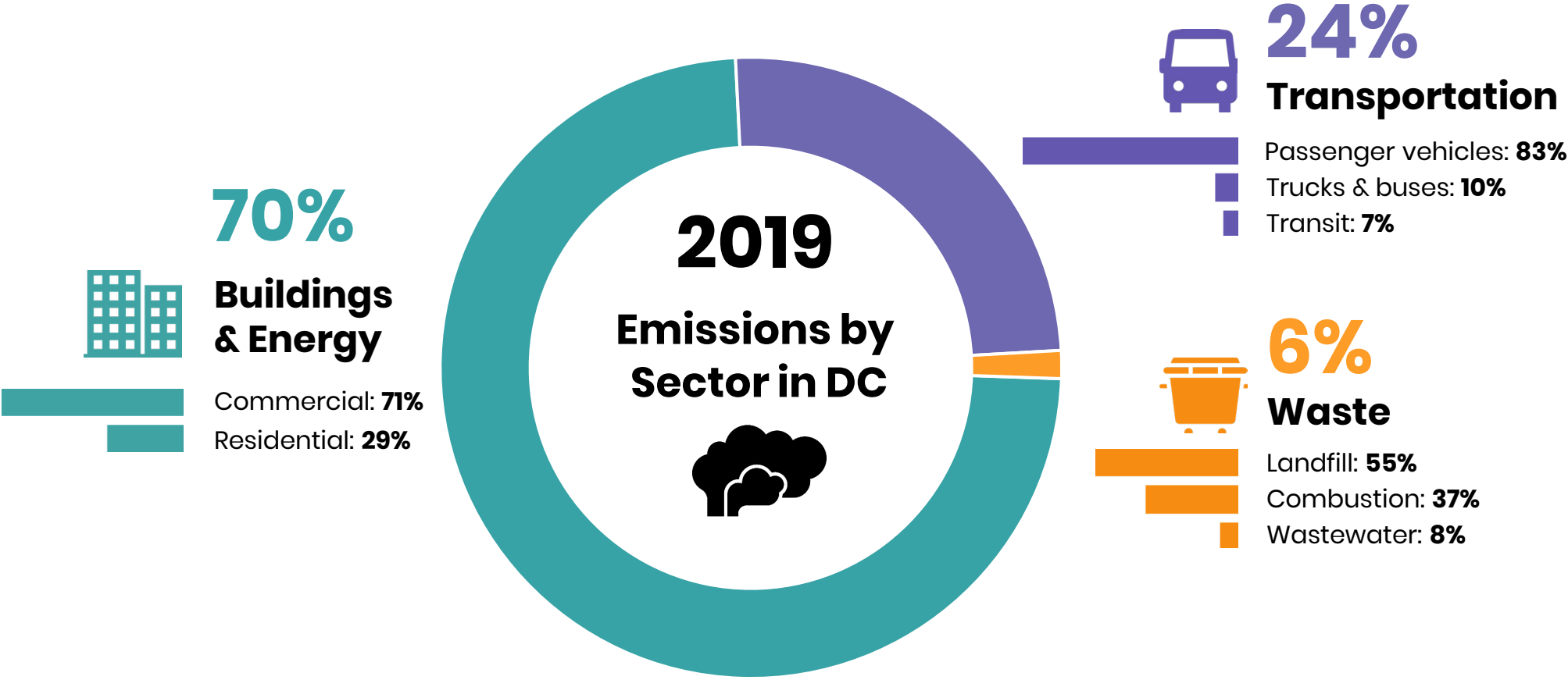
A BEPS set minimum thresholds for energy performance for existing buildings.

These standards are based on and measured against a building's demonstrated energy performance, as shown in their benchmarking data.

Metric is ENERGY STAR Score for eligible buildings; Source EUI otherwise



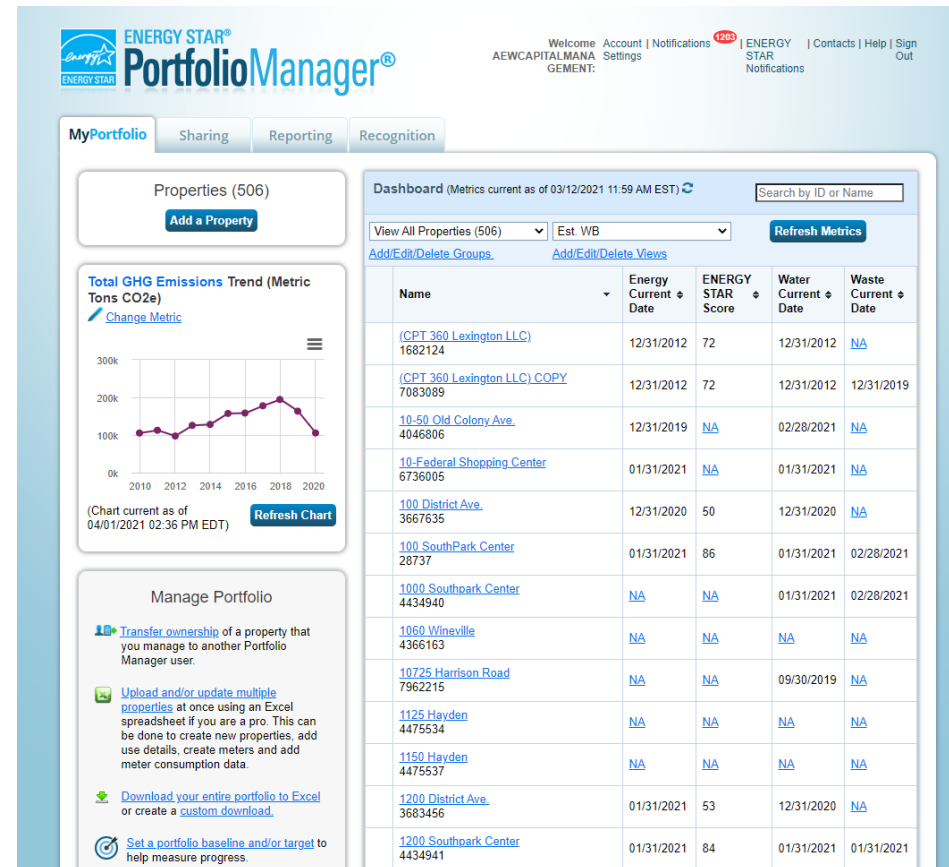
Linking to DC's goals



Benchmarking

BEPS and Benchmarking Your Building(s)

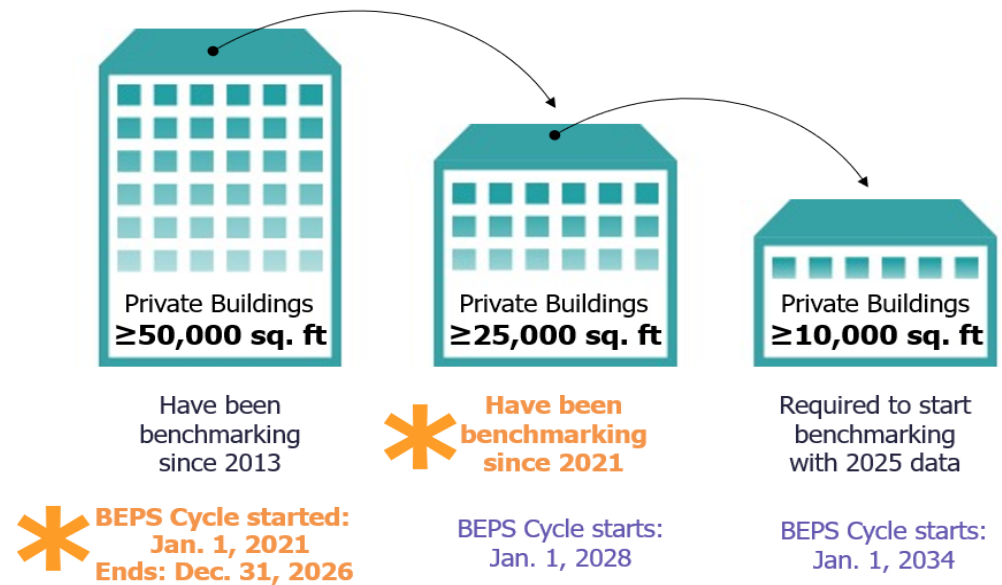
- Buildings are subject to benchmarking based on their floor area.
- If you are required to benchmark your building, you must track your energy and water use annually using ENERGY STAR® Portfolio Manager and report it to the Department of Energy and Environment (DOEE) by the compliance deadline of each year.



Building Size Requirements

Learn About BEPS & Your Building(s)

- The first BEPS cycle applies to buildings over 50,000 square feet.
- Cycle 2 will expand to include buildings 25,000 sq. ft. and greater.
- Cycle 3 will expand to include buildings 10,000 sq. ft. and greater.

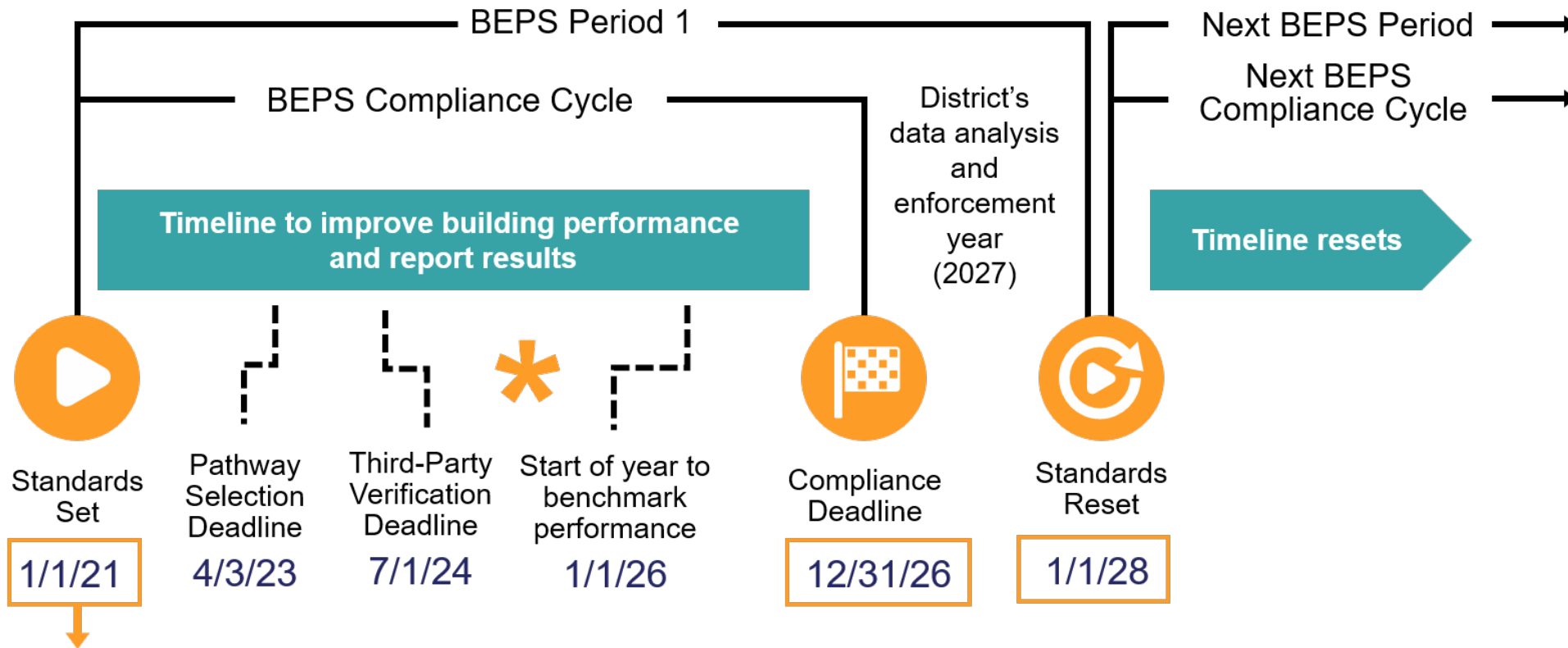


- Buildings that met the standard during the baseline year do not need to take any immediate action, but if they don't meet the next standard, they will want to prepare for that next deadline.
- For any buildings that do not meet the energy performance standards for their size and type, DOEE will provide a set amount of time to comply with the requirements. This is called a "compliance cycle."



Timeline

Snapshot Review of BEPS Cycle 1



Meet the Standard? No action required under BEPS 1. Plan for BEPS 2 NOW.
Do not meet the Standard? Must improve performance in the Compliance Cycle.

* Where we are
NOW in the timeline.





Planning for the BEPS Compliance

What you need to know before starting

Stakeholders

Deciding who will manage the process

- **Approvers**
 - Approving body that will review all proposed work, contracts, report results, funding/financing options, etc., and who will ultimately sign off on next steps.
- **BEPS Project Manager**
 - Responsible for the day-to-day management of the BEPS process and final BEPS submission.
- **Helpers**
 - Responsible for assisting the project manager with various BEPS-related tasks, such as creating or updating the ENERGY STAR Portfolio Manager account, collecting utility information, coordinating communications between residents.



Requirements

Understanding the BEPS standards you will need to meet

- The BEPS standard for multifamily buildings for BEPS Cycle 1 is an ENERGY STAR score of 66, or a Source Energy Use Intensity (EUI) of 110.7 kBtu/ft² for rare multifamily buildings that do not qualify for an ENERGY STAR score.
- If your building has an ENERGY STAR score, your compliance is based on this number (66), not the Source EUI.

Status Checklist

Name: Date Completed:

☐ Utilize the [BEPS Disclosure](#), [Energy Benchmarking Map](#), or [Building Owner Portal](#) to find your building's current energy performance. Or for more instructions, use the [guided tour](#) to assist you. This tells you if your building's energy performance meets or does not meet the BEPS.


Note what your building's compliance status is below:

☐ Date:

☐ Log your score information for future reference.

BEPS 1	ENERGY STAR Score	Source EUI
Multifamily Standard (includes Condo and Co-Ops)	66	110.7
My Building	<input type="text"/>	<input type="text"/>

☐ Calculate the amount of energy your building will need to reduce to meet the ENERGY STAR score determined above by setting a target in the ENERGY STAR Portfolio Manager goals section. Utilize [this ENERGY STAR website](#) for instructions on how to set a target.



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Costs

Funding and Financing Opportunities

- **Hub's** Funding & Financing Portal:
- Connect with the **DCSEU** to learn how to receive financial support from the their whole building and individual unit rebate and incentive offerings and possibly qualify for the Affordable Housing Retrofit Accelerator program.
- **DC Green Bank:** Also offers special financing that may be relevant.



Energy Measurement

Consider an energy audit

- **What is an energy audit and why do I need it?:** It will help you get a full understanding of how your building uses energy or what type of energy efficiency measures are needed to meet the BEPS.
- **What kind should I get?:** ASHRAE Level II Energy Audit.
- **Doesn't it cost?:** Yes it does, but it is a relatively small price to pay compared to the savings you can receive for doing it correctly or the penalties you could receive for non-compliance.



Communication

Talking with your board and residents

- **Effective communication approach:** Emphasize the importance of clear, consistent messaging to ensure tenant and owner engagement throughout the process.
- **Involve stakeholders:** Property managers and boards can involve tenants and owners in decision-making, through meetings, informational sessions, or newsletters.
- **Building buy-in:** Address concerns, share benefits, and keep all parties informed about the steps and timelines involved.
- **Resources for communication:** Use toolkit templates or frameworks to create letters, FAQ's and community meetings agendas.



Sample Slides

Communication slide deck & overview

Condo and Co-Op Adaptable
Power Point Slides



What's in the Slides

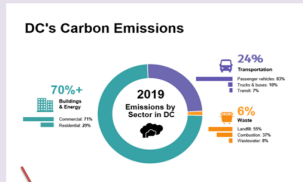
How to Use the Slides

The slides in Section 1 and beyond are intended for use by the condo or co-op management team in working with their board and residents. The notes section (below the slides) has key talking points and instructions for the presenter.

Note: Not all slides can be edited because some slides contain exact government language pertaining to BEPS.

By downloading these slides, you have agreed not to distribute content that alters the meaning of what the Hub has provided.

If you need assistance, contact info@buildinginnovationhub.org



Suggested presenter notes: To get to the carbon neutrality goal (where we are not producing carbon than the Earth can naturally absorb) goal, we need to reduce our local overall greenhouse gas emissions to reduce our carbon output. The energy produced/burned to run our buildings and released as carbon is responsible for the majority of DC's greenhouse gas emissions.

Who Created the Slides

These slides were created by the [Building Innovation Hub](#) in partnership with the [DC Sustainable Energy Utility](#). Note that these slides do not guarantee compliance with the BEPS or other policies and regulations.



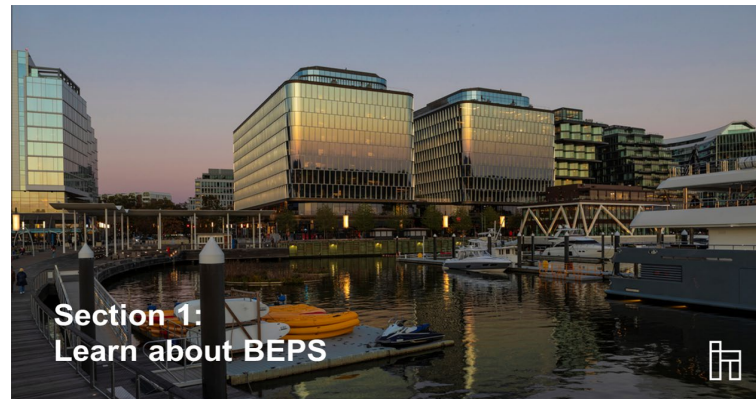
DCSEU offers rebates for multifamily buildings your building might qualify for and has assistance available at their website: www.dcseu.com



The Building Innovation Hub helps building industry professionals in and around Washington, DC create and operate high-performing buildings. Contact us at info@buildinginnovationhub.org



The Institute for Market Transformation (IMT) is a national nonprofit organization that manages the Building Innovation Hub. It strives to improve the efficiency and performance of the places we live, work, and learn. Learn more at www.imt.org.



Agenda – Section 1: Learn About BEPS

Topics

- ➔ **Overview**
Learn About BEPS
- ➔ **Timeline**
BEPS Cycle 1 Process
- ➔ **Benefits**
Benefits of BEPS
- ➔ **BEPS and Your Building**

A photograph of three industrial workers in a facility. In the foreground, a man in a white hard hat and a yellow safety vest is looking down at a clipboard held by a woman in a yellow hard hat. The woman is wearing a dark vest over a plaid shirt. In the background, another worker in a white hard hat and plaid shirt is visible, looking towards the right. The background is filled with complex industrial machinery, including pipes, valves, and electrical components.

Starting the BEPS Compliance Process

First steps

Data-based Decisions

Review energy audit results

- Executive summary
- Research summary
- Compliance Pathway recommendation
- Estimated energy and cost savings
- Ancillary (extra) benefits
- Available incentives (outside funding)
- Estimated energy efficiency measure costs
- Certified compliance with ASHRAE Standard 211
- Supporting documentation



Compliance Pathways

Understand your options

Building owners have a variety of options for bringing their buildings into compliance, flexibility is built into the program.



Most Common Compliance Pathways

- **Performance Pathway:** This plan requires a Site Energy Use Intensity (EUI) reduction of at least 20 percent. The actions to achieve the 20 percent reduction for condos and co-ops are up to the boards.
- **Standard Target Pathway:** For condo and co-op buildings, this plan requires the building to reach an ENERGY STAR score of 66. The actions are up to the boards.



Lower Energy Use

Implement low-cost energy efficiency measures

- **Create** door hangers, sticky note reminders, posters, or light switch covers to help occupants or employees remember to take action.
- **Hold** an energy fair, conduct an energy awareness event in the lobby, or offer building tours to give occupants a sneak peek at the inner workings of the building.
- **Give** incentives and recognition.
- Depending on savings levels, you may also consider **awarding** cash or prizes for great energy saving ideas or to energy champions in the building.



Contractors

Find and hire local contractors

- The energy audit you completed will have a recommendation for energy reductions.
- Use this as a starting point to write a scope of work (SOW) for how to change your building's Pathway potential contractors.
- After you have the SOW, you can either reach out to your networks of contractors who usually maintain your building or create a request for proposals (RFP) for qualified vendors to bid on your project.
- Use the Hub's High-Road Contracting Toolkit to reach outside typical vendors, support the local workforce, and connect with small, minority-owned, and women-owned businesses.
- Submit a RFP to the Hub's Find-A-Vendor portal.



Reporting

Report your findings to DOEE

The screenshot shows the 'Create Ticket' page on the DOEE Building Performance Helpdesk. The page has a green header with the text 'Building Performance Helpdesk' and 'District of Columbia Department of Energy and Environment', along with the DOEE logo. A dark sidebar on the left contains links to 'Homepage', 'New Ticket', 'Knowledgebase', and 'BEAM Inventory'. The main content area is titled 'Public / Create Ticket' and features a form titled 'Submit a General Inquiry'. The form includes a text box for 'Submitter Email' with a note that it will receive public updates, a text box for 'Submitter Name' with a note that it is the primary contact, and a text box for 'Building Name'. A 'Show desktop' button is visible in the bottom right corner of the form area.

Building Performance Helpdesk District of Columbia Department of Energy and Environment

Public / Create Ticket

Submit a General Inquiry

DOEE offers a Building Performance Help Center, which provides program information, technical support, and assistance with complying with District regulations and using ENERGY STAR Portfolio Manager. To ask a question or request direct assistance please submit a general inquiry below.

Submitter Email*

This e-mail address will receive copies of all public updates to this ticket.

Submitter Name*

The primary contact for the individual submitting the requestion

Building Name

Show desktop

<https://dc.beam-portal.org/helpdesk/tickets/submit/1/>



Compliance Challenges

Find help

- How to change your building's Pathway
- How to request an extension
- How to request a delay of compliance
- What to do if you're fined
- What to do if you run out of funding/ have contractor bad experienter bad experience



An aerial photograph of a dense urban cityscape, likely New York City, showing a high concentration of skyscrapers and buildings. The image is used as a background for the text overlay.

Appendix

Case studies, resources, and next steps

Additional Toolkit Resources

- **BEPS Applicability Checklist**
 - What if my building doesn't meet the standard?
- **Benchmarking Checklist**
 - Additional benchmarking resources and Third-Party Data Verifiers info materials.
- **BEPS Compliance Pathway Cycle 1 Steps**
 - In-depth details and understanding of each compliance cycle



Upcoming Events and Webinars

Sign up for the Hub's newsletter



**March 27th, Roundtable Session
for
Low-Income Multifamily
Properties**



**May 14th, Monthly Conversation
Sessions: "Green Table Talk"**



Thank You!

Let's keep in touch

Contact information for further assistance:

- www.buildinginnovationhub.org
- www.linkedin.com/company/building-innovation-hub
- [**info@buildinginnovationhub.org**](mailto:info@buildinginnovationhub.org)
- Sign up for the Hub newsletter through the QR code





Thank you to
our supporting
members!

Sponsored by generous
funding provided by:



Transformer

ARUP

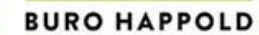
Innovator



Partner



Contributor



Friend



NATIONAL CAPITAL REGION



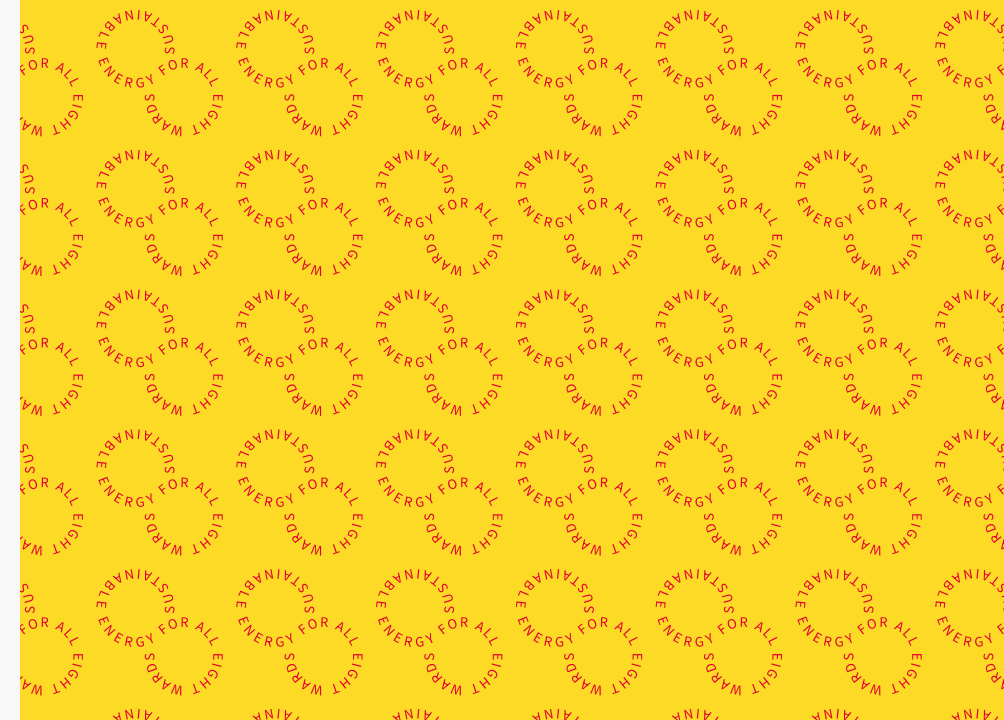
Condos, Co-ops, and the DCSEU

Patti Boyd

DCSEU Incentive Programs



**DISTRICT OF
COLUMBIA
SUSTAINABLE
ENERGY UTILITY**





What to know about whole building and common area upgrades?

- Condo/Coop associations/boards can apply for DCSEU rebates and incentives for common areas, just like a business
- The project may also qualify for additional technical assistance
- If you think your condo/coop may be income qualified (>50% of units ≤80% AMI) the DCSEU has additional program offerings like the Affordable Housing Retrofit Accelerator (AHRA) for multifamily buildings

Business Rebates

Standard Rebates

- Lighting
- Motors
- HVAC
- Refrigeration
- Food Service & Vending
- Electric Lawn Care

Instant Rebates

- Lighting
- HVAC

Custom Incentives

Any measure or operational improvement you are making in your District-based building that provides cost-effective electric savings is potentially eligible to receive technical assistance and rebates from the DCSEU.



What to know about individual unit upgrades?

- Condo/coop individual unit owners can apply for DCSEU “residential” rebates
- New this Fiscal Year – Electrification upgrades
- If you believe an individual unit(s) in a 5 -20 unit condo/coop building may be income qualified ($\leq 80\%$ AMI), they may be eligible for a single gas appliance to be replaced with an electric alternative (induction stove, heat pump hot water heater or clothes dryer).

All DCSEU Residential Rebates

All rebates are only for qualifying electric equipment



Home Heating*
\$1,000-\$5,000 off



Dehumidifiers*
\$35 off



Smart
Thermostats*
\$50 off



Air Conditioning*
\$250-\$5,000 off



Washers & Dryers*
\$75-\$700 off



Refrigerators*
\$75-\$100 off



Water Heating
\$750-\$1,600 off



Electric Lawn
Equipment
\$75-\$500 off



Stoves*
\$400-\$800 off



**Look for the ENERGY STAR
logo and/or check the
model # on our [site](#)*

Electrification (Residential) Rebates

Electrification rebates are only eligible for completed equipment upgrades for customers replacing gas/oil water or space heating equipment with a heat pump water heater or heat pump HVAC equipment.

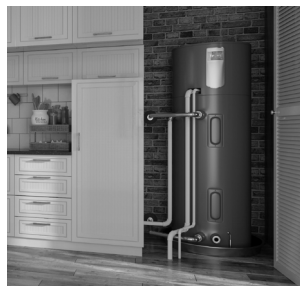


Heat Pumps

\$4,000-5,000 off

Ducted and ductless

These must be ENERGY STAR certified.



Heat Pump Water Heaters

\$1,200-1,600 off

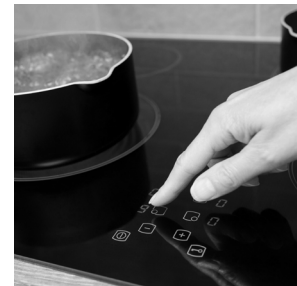
These must be **NEEA** certified.



Conventional & Heat Pump Dryers

\$250-600 off

These must be ENERGY STAR certified.



Electric & Induction Stoves

\$600-800 off

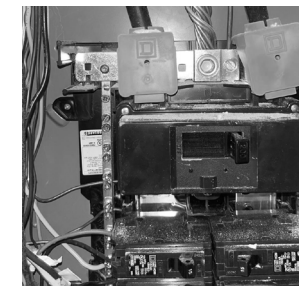
These must be ENERGY STAR certified.



Heavy-ups

\$2,000 off

These are only available to residents installing a new heat pump or heat pump water heater.



Electric Circuit Additions

\$400 per circuit (up to three)

These are only available to someone installing a new electric stove, dryer, heat pump, or heat pump water heater.



What are my next steps?

- Take our Find a Program Quiz to determine what DCSEU program or service is right for you at **dcseu.com/find-your-program** or call us at (202) 479-2222.
- Contractors, consultants, and property managers can take the first step by bringing your building wide project to a DCSEU Account Manager or **dcseu.com/start-a-project**

Thank You



**DISTRICT OF
COLUMBIA
SUSTAINABLE
ENERGY UTILITY**