



## Building on Success to Introduce Scalable SEM to New Markets

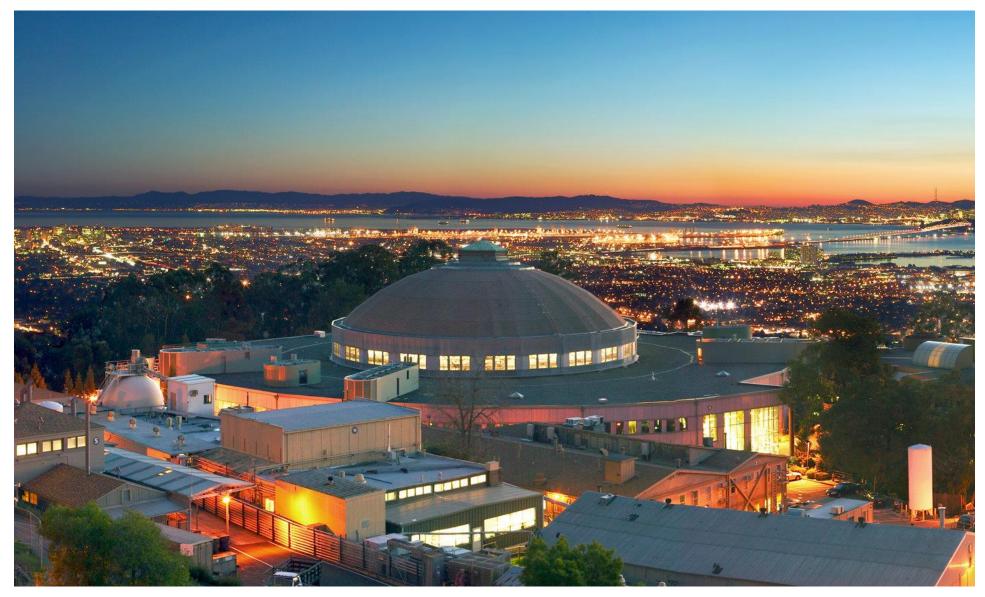
Part 1: Insights from California's ongoing process to develop SEM programs Part 2: How to leverage DOE's latest SEM tool: 50001 Ready program

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November 08, 2017

## Lawrence Berkeley National Laboratory









# Part 2: How to leverage DOE's latest SEM tool: 50001 Ready program

## Wild Turkeys 1 - LBNL 0

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## ISO 50001 and SEM



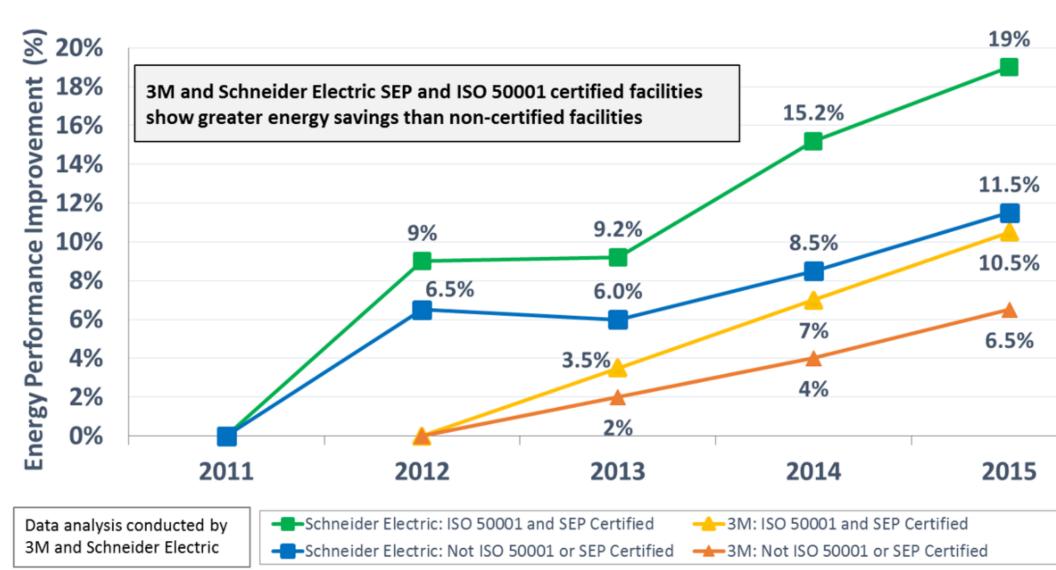
- What it is:
  - Flexible framework for managing energy
  - Management model for continual improvement of energy performance
  - Set of requirements allowing for third party verification of conformance
- What it does:
  - Builds institutional knowledge
  - Engages all staff (executive, facility, procurement, communications...)
  - Reduces business risk associated with energy cost and supply
  - Establishes culture around energy performance improvement
  - Enables cost-effective and rapid investment in advanced energy efficient technologies





FNFRGY MANAGFMFNT

## **ISO 50001: Initial performance data**



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## **US DOE ISO 50001 based offerings**





50001 Ready recognition: Self-attestation prepares organizations for certification options—*recommended but not required*!



International Organization for Standardization

## ISO 50001 certification:

- 1. Confirm completeness of system management and review cycles
- 2. Third-party audit to verify conformance to ISO 50001 standard



International Organization for Standardization



ISO 50001 and SEP certification: ISO 50001 certification, plus demonstrate energy performance improvement:

- 1. Top-down regression analysis
- 2. Bottom-up sanity check
- 3. Third-party audit to verify energy performance improvement



## Energy.gov/50001Ready

50001Ready Home

About Partners

Tools & Resources

Get Involved

#### 50001 Ready Program





The Energy Management Journey



#### **Tools and Resources**



#### Newsroom

# 50001 Ready Navigator – Online ISO 50001 based guide to EnMS implementation



- Online step-by-step approach towards ISO 50001 based energy management system standard implementation
- Guidance broken into straight forward sections, including:
  - Getting It Done what specifically needs to be accomplished
  - Task Overview how does this task connect with ISO 50001
  - Full Guidance comprehensive guidance about the task
  - Transition Tips from other ISO management systems
- Form teams and assign tasks to team members

**Detailed Guidance: Scope and Boundaries** 

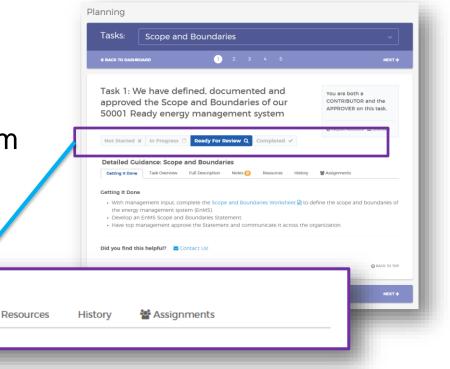
Full Description

Notes 🕕

Task Overview

• Access over 100 related resources

Cetting It Done



## EnPI Lite – Online facility boundaries M&V tool



EnPI Lite is a web based calculator that estimates energy savings relative to relevant variables, like production levels and weather, using linear regression

## EnPI Lite Steps:

- 1. Input Energy Consumption and Relevant Variable Data
- 2. Regression Analysis (automatic)
- 3. Adjust Data / Models as needed
- 4. Download Results

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Note: Provides the same fundamental analysis as the other DOE EnPI tools with similar options

## **Co-branding and customization**

- Navigator has been developed on open-source standards to enable co-branding and customization.
- Issue 50001 Ready recognition as a partner organization
- Add Tooltips, Resources and FAQs specific to your organizational or regulatory requirements
- Track overall process of ongoing projects

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30001 Read	ly					Conta		<b>⊘</b> FAQs	My Tasks
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		Total Projects	31		Sector	#	A	ssociation	#
	Pro	jects w/ All Tasks Completed	3		Industrial	14	E	etterPlants	3
		Projects w/ Uploaded Files	2		Commercial	8		FEMP	4
		cts Submitted for Recognition	0		Institutional	8		No	21
		jects Given DOE Recognition	1		Not Specified	1	N	ot Specified	3
		Total Users	29				_		
		Total Notes	13		Resource		_	e Resources	
		Total Tracked Events	297		FAQs	62	_	age FAQs	
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mprove	anen	Task 15: Measurement			12.996		0.096	87.1 96	
		Task 16: Operational Control	5		9.796		3.296	87.1 96	
		Task 17: Corrective Actions			12.996		0.096	87.1 96	

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- 266,000 square foot fruit and vegetable refrigerated warehouse
- Started project in May; recognized as 50001 Ready in June
  —5 weeks engagement, approx 80 hours effort
- Drew from expertise from every department, including HR, accounting, packing, warehouse, and executive leadership
- "Great refresher" for reconfirming operations and lessons learned from previous engagement with utility Continuous Energy Improvement program
- Hope to use EnMS practices to improve ENERGY STAR score

## Find out more!

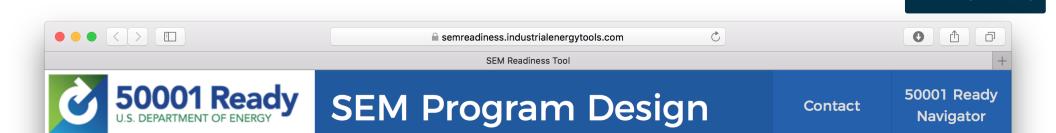




Visit the 50001 Ready website at energy.gov/50001Ready

- Download infosheets and FAQs
- Find links to the Navigator and EnPI Lite
- See 50001 Ready facilities \*\*coming soon!
- Read case studies and additional resources
- Read more about ISO 50001 and related programs

## **SEM program design tool**



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### Welcome to the SEM Program Design Tool!

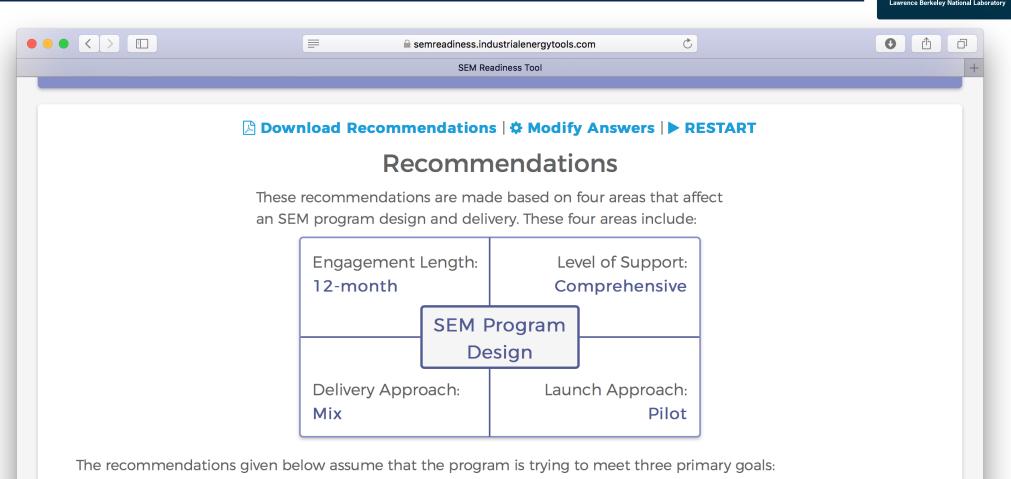
This tool is provided by the US Department of Energy to provide guidance to program administrators who are considering starting or modifying an SEM program, particularly one that is compatible with 50001 Ready tools and programs.

The tool helps administrators think through different elements that influence the design of an SEM program and provides insights and recommendations on some of the major decisions that need to be made, including:

- 1. How long the program customer engagement should be
- 2. How much support the program should provide customers
- 3. Whether the program should be delivered through cohorts or individually
- 4. Whether the program should start with a pilot or launch directly

BEGIN SELF-ASSESSMENT

## **SEM program design tool**



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- 1. Help the customer establish an Energy Management System (EnMS)
- 2. Help the customer save energy
- 3. Help the customer measure and validate (M&V) and report energy savings

### **Engagement Length**

How long the SEM program engages with customers is one of the first decisions a program has to make This

# Partner with utility ecosystem to incorporate 50001 Ready into SEM programs



Increase the number of facilities adopting an 50001 based energy management system

## Divergence between DOE goal and SEM resources



Increase the number of facilities adopting an ISO 50001 based energy management system

# SEM programs reference existing programs

- Those programs are not aligned with 50001
- Materials from those programs is proprietary or hard to get
- Material is difficult to edit

## Value propositions of basing a utility SEM program on ISO 50001



- It is where the market is going
  - —Rapidly becoming the global standard in more than just name
- Will impact supply chains
- DOE recognition for customers
- Platform to know that culture of continual improvement is thriving
- Works for your customers
  - —Facilities in multiple service territories and across state lines
  - —Allows the company to seek ISO certification or not, but they are in line for it
  - -Clear statement of sustainability practices
- Establishes a clear benchmark for energy management

## Objective – Converge SEM best practices with ISO 50001 Ready enhancements



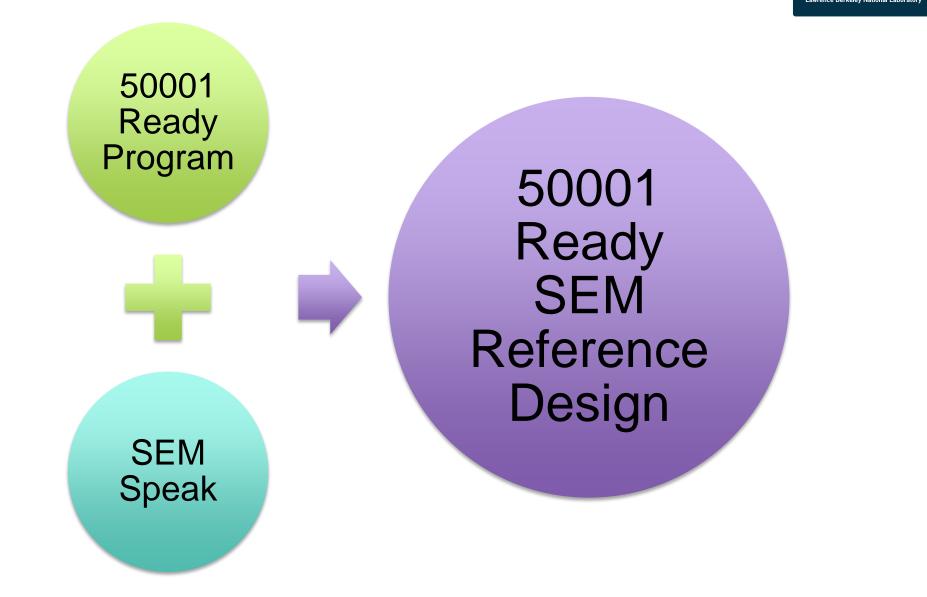
## Create a 50001 Ready "SEM" Reference Design

- Publicly and easily available
- Configurable
- Guidance
- Based on proven approaches

Work with the utility "ecosystem" to adopt the design

- National/regional entities (CEE, REEOs, ACEEE)
- Utilities, PBAs
- Implementation contractors
- Regulators

## 50001 Ready SEM reference design



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# Why a 50001 Ready SEM "reference" design



50001 Ready in "SEM Speak"

 50001 Ready for Utilities

 Allows facilities working with utilities to seek 50001 Ready attestation

## Publicly Available

- · Easy to find
- Available to all: Utilities, Implementers, Evaluators, regulators, etc.

## Configurable

- Open Source
- Source documents available
- Easy to edit and modify

## Four "buckets" of utilities/PBAs



Established SEM Program (>5 years)

- BC Hydro (67)
- BPA (92)
- ETO (192)

#### Recent SEM Program (1-5 years)

- Ameren Illinois (8)
- Commonwealth Edison (18)
- Hydro Quebec (20)
- Idaho (26)
- Nova Scotia (11)
- PacifiCorp (17)
- Vermont (14)
- Wisconsin (30)
- Xcel (146)

No Current Program- Launch w/in 1 yr

- California
- NYSERDA

#### No Current Program- Looking to Launch

- Duke
- Massachusetts
- National Grid
- TVA



## **Better Customer Offering**

Faster SEM Program Start-up

Lower SEM Program Start-up Costs

More SEM Program Implementers

**Better Alignment with Other Utilities** 

## Approach





## California Industrial SEM Design Guide

VERSION 1.0, FEBRUARY 8, 2017 PREPARED BY: SERGIO DIAS CONSULTING LLC

PREPARED FOR: PACIFIC GAS AND ELECTRIC, SAN DIEGO GAS AND ELECTRIC, SOUTHERN CALIFORNIA EDISON, AND SOUTHERN CALIFORNIA GAS COMPANY

# Timeline for 50001 Ready "SEM" reference program design



Design Document Draft

# December 2017

Implementation Materials Draft

# March 2017

 TBD: Utility and Implementation Tools Draft

## We want partners, not just reviewers



# **MOU** W

To work with us to finalize the 50001 Ready SEM program design and then launch it!





# energy.gov/50001Ready energy.gov/ISO50001

**Contact Information** 

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