

bEQ Monthly Web Meeting – March

Date: Fri, Mar 17, 2017

Participants: Julia Keen, Esteban Baccini, Kushagra Juneja, Ross Montgomery, Nate Boyd, Shanta Tucker, Edward Tsui, Darryl Boyce, Hoy Bohanon, Bruce Hunn, Hugh Crowther, Jaap Hogeling, Charles Eley

Staff: Lilas Pratt, Joslyn Ratcliff, Lauren Walters, Jim Scarborough

Action Items:

- **AI 1: Committee members** to provide any additional feedback on the label design drafts to Julia Keen by Monday, March 20
- **AI 2: Julia Keen** to take the feedback on the label designs back to Marketing and have an updated draft created for discussion on the next monthly call (April 7).
- **AI 3: Committee members** to send feedback on the two strawman fact sheets to Julia Keen by Friday, March 24.

Meeting Notes:

1. Methodology Subcommittee Report:

- Web Portal Update
 - Most recent screen shots and wire frames shown to committee
- Lab Ratings – Feedback from TCs
 - Hunn contacted LBNL regarding work that they had done on laboratories. They are exploring expanding the set and doing additional analysis. A conference call has been set up with LBNL, TC 9.7, TC 9.10 and Bruce Hunn.

2. Marketing Subcommittee Report:

- Roll out Building EQ including Web portal Label / Award Design Drafts (Attachment sent with Agenda)
 - Bruce Hunn: The design is clean, easy to read. Would like to see a smaller, more precise indicator on the scale rather than the leaf which covers a large area.
 - Charles Eley: Like the direction the design is going. Might suggest flipping the scale so that zero is at the bottom.
 - Darryl Boyce: Turning the scale might not work well, would suggest keeping the zero at the top.
 - General agreement that the zero should be at the top.
 - Darryl Boyce: Would probably add a value to the average so know what it is.
 - Question: should average be in the center?
 - Lauren Walters: the placement of the average was in keeping with the original label
 - Note: Even though average (i.e., median) has always been zero, the original label had additional bars above the average point to emphasize the higher performing buildings.
 - Shanta Tucker: The color of the name of the building at the top seems to be connected to the score, was that intentional?
 - Lauren Walters: Yes, the idea was to tie the color of the building name to the score.
 - Question: What about if the building has both the IO and AD score? What do you tie the color to in that case?
 - Nate Boyd: Like the color coordinating idea and the off center scale. However, feel there is too much white space and would like to add ghost score (to be used later for potential score if all ECMs are implemented and/or for a list of the top 5 ECMs)
 - Charles Eley: Disagree, the ECM information needs to go on a different report, not on the label/award.

- Hoy Bohanon: Agree with Charles, that would be an invitation to gamesmanship and white space is not a bad design element.
- Jaap Hogeling: Find the the non-linear scale to be confusing. Where does the 100 come from? That is from the calculation of the score (candidate EUI / median EUI * 100). If the candidate EUI equals the median EUI, then the score will be 100.
- There was some heartburn over the placement of the 100 on the scale.
- General agreement that this label is a big improvement. The committee likes the direction of this design.

One Page Fact Sheet Draft (Attachment sent with Agenda)

- The committee is asked to review the fact sheets and provide feedback to Julia Keen over the next week.
- Julia Keen will collect comments over the next week and consolidate those for a second review by the committee.

Possible Journal articles

- Hugh Crowther is planning to have a dialogue with Jay Scott regarding articles on the program and where those articles might best live and what they should cover.

▪ Drive the Sales Plan

- APPA is one of the big sales opportunities. Darryl Boyce will be meeting with APPA at the end of April. If fact sheets are available by then, it would be useful to have those for that meeting.
- The seminar planned for Long Beach meeting has been approved. The speakers will now flesh out their presentations. There could be some speaker conflicts that will need to be addressed.
- BOMA is another target that will be approached after the APPA link is more settled.
- The city of Edmonton has reached out to ASHRAE regarding using Building EQ as a tool to support their policies.

▪ Marketing input to Web Portal ([Attachment A](#))

- Kushagra Juneja review the results of the subgroups March 16 meeting.

▪ Licensee Program Business Plan (Boyd – 5 minutes)

- Nate Boyd has a conference call scheduled with OUC and City of Orlando and should have a draft of the licensing business plan by April 7 (next monthly web meeting) for review by the committee.

3. Update on Adapt bEQ Adhoc progress

- Course name: Benchmarking and Assessment of Building Energy Performance
- The plan is to roll out the course by June 2017.
- Additional information is available on the ASHRAE Student Zone web page at: www.ashrae.org/educationalresources
- Universities that are interested include UCF (University of Central Florida) and two universities in Canada that David Underwood has identified.

4. **Next call:** Friday, April 7 at 10am-11am Eastern Daylight Time

Call-in details will be sent prior to the meeting

Attachment A: Web Portal Reports – MBO Subgroup 3/16/17 Meeting Notes

- What would be the user willing to pay for?
 - Three types of users:
 - Registered User (not necessarily a BEAP/BEMP/PE)
 - Certified User (BEAP/BEMP/PE)
 - Subscriber User (Scale of annual fees depending on usage level)

Options

- Drag and Drop Reports (customized reports) may be only made accessible to paid users (subscribers)
 - Summary of the actionable recommendations selected by the certified user – can charge for that
 - BEAP/PE selects the actionable items from the pull-down menu based on their walk-through of the facility
- Energy numbers may be run in a quick excel tool, and anomalies may be pointed out
 - Metered energy data on a monthly basis
 - Not in current scope of work – need a description to get a cost estimate
 - Quality checks/error checks will be in the Web Portal application
- Building EQ expedited reviews like LEED
 - Charge a fee for an expedited review
 - Web portal application should shorten the review process for all applications
- Greater access to drag and drop features such as trend logs, historical data of similar building types, issued under seal by a LPE/BEMP/BEAP
 - Subscriber users
- Chance to participate in the annual Building EQ performance award, can award top 3 among all certified (rated) buildings during the year.
 - Pick top three buildings in a calendar year to get the award
 - Nominate buildings (opt-in) to be considered for this award
 - Award can be further refined as the program grows into categories such as building type, country, etc.
- Are the old forms still being used? If yes need to discuss earlier mark-ups and discuss among committee to give more inputs.
 - Changes previously identified have been used in the portal development and to correct inconsistencies in the current process.
- Status update from Charles and if he needs any specific inputs from this group?
 - Development is still on the inputs, user interface, and screen set-ups
- Discussion points during March monthly call.

bEQ Monthly Meeting

Date: Fri, Apr 7, 2017

Time: 10:00 AM - 11:00 AM EDT

Participation: Bohanon, Eley, Keen, Hunn, Hogeling, Juneja, Montgomery, Nall, Tucker

Not available: Crowther, Misuriello

Staff: Gupta, Walters, Pratt

Guests: Stephen Roth

Action Items:

- **AI 1:** Pratt to look at web portal accordion label descriptions for possible suggested heading changes
- **AI 2:** Eley to provide a testing protocol document for the web portal by May 5, 2017
- ✓ **AI 3:** Pratt to send out letter ballot to approve label design concepts
- **AI 4:** Pratt to provide label concept design to Stephen Roth for generation by the web portal
- ✓ **AI 5:** Pratt/Bohanon to send out fact sheets for feedback by April 14.
- **AI 6:** Marketing to redo the final fact sheets with new collateral once feedback has been received from the committee and outside entities.
- ✓ **AI 7:** Pratt to send out information on website issue and ask for vote/feedback

Meeting Notes:

Meeting convened at 10:02pm EDT (A quorum was not present)

1. Web Portal Demonstration (Roth/Pratt)
 - The database structure has been updated somewhat from what was shown in Las Vegas
 - A framework for languages has been created which can be changed by layman (dynamic XML file). The validation framework is set up the same way.
 - The home screen for a user that shows the status of all their projects.
 - The Manage Projects screen includes notes to/from ASHRAE. Questions on this: how is that intended to work? Could this be a chat feature?
 - The “workbook” screens are set up with nested accordions. Clicking on the Submit key saves and validates the data on the screen.
 - It is very easy to change look and feel of the pages which have not yet been updated to the marketing collateral from Godfrey.
 - The early testing phase targeted for mid-May (which would allow for a month of testing prior to the Long Beach meeting).
 - Launching the full web portal by Long Beach launch will be tight. The In Operation portion will definitely be ready, they are cautiously optimistic on the As Designed portion.
 - Current plans for the testing include: Pratt to enter actual submissions and engage other staff. Ross Montgomery will also be engaged to test the site.
2. Building EQ Label Design (Keen)
 - PDF’s demonstrating the current design concepts were sent out with meeting agenda.
 - Labels are currently manually created by the Marking Team, which is not a sustainable approach long term. The goal is to automate the process as part of the web portal.

- It's the committee comfortable with the concept of the design and the understanding that might be some small editorial changes needed in order to automate the generation of the label
 - It was suggested that the information at the bottom be simplified. The energy consumption information needs to be large enough to read. It was also suggested that the right hand margins be aligned.
 - One question was whether or not the use of "Excellent" is okay or if Net Zero would be better? Those on the call leaned towards "Excellent"
3. Building EQ fact sheets (Keen)
- Three fact sheets were sent out prior to the call. While these designs are shown with the new logo, they are not currently in their final format. They will use the new marketing collateral when finalized.
 - Final feedback on the fact sheet content is needed from the committee and outside entities.
 - Several errors/typos were noted on the call including the order of the information on the APPA targeted sheet. It was suggested that the order of the information on the APPA sheet be corrected using the current format before sending it out for feedback.
 - The APPA targeted sheet will be sent to APPA for feedback and the Government targeted sheet will be sent to GGAC.
4. Web Site Location (Pratt)
- It has been recommended that the Building EQ web pages be located on the ASHRAE web site rather than using a separate standalone site.
 - These pages would be informational only. The actual submission process would take place entirely within the web portal which would be accessed via these pages.
 - The existing bEQ web site URLs would be preserved in order to keep others from using them and also to direct people to the pages on the ASHRAE web site.
 - Information on this will be sent to the committee for a letter ballot vote.

Meeting adjourned at 11:05am EDT

Building EQ Monthly Call

Date: Fri, May 5, 2017

Time: 10:00 AM - 11:00 AM EDT

Participants: Hoy Bohanon, Hugh Crowther, Julia Keen, Nate Boyd, Ross Montgomery, Kushagra Juneja, Darryl Boyce, Bruce Hunn, Esteban Baccini, Charles Eley

Not available: Dan Nall, Hywel Davies, Jaap Hogeling, Shanta Tucker

Staff: Lilas Pratt, Stephanie Reiniche, Joslyn Ratcliff, Vanita Gupta, Lauren Walters, Emily Sigman, Krystin Gilstrap

Meeting convened at 10:02 am

Quorum was reached.

Agenda

1. Marketing Updates

a. bEQ Video Proposal (see explanation below)

- The idea is to create a video that provides a different approach to getting people excited about looking into and/or continuing the process of using Building EQ.
- The inspiration for the proposal came from this Delta video:
www.youtube.com/watch?v=Z6JRidQkWsk
- Theme from sample video is “we understand you and want to make your job easier”
- Suggestions from Marketing include
 - White board (animated) video
 - Going through a building pointing out what could be improved
 - Top 10 video on just about anything
 - Scientific overview, something more technical
 - Be an Energy Genius tagline
- Thoughts from committee
 - Like idea of Be an Energy Genius – non-technical approach but rather engage people to get them to go to our website
 - Target audience to website is primarily members, someone technical who does this for a living (conducts or receives these assessments), own a building or conduct assessments, probably not academics or manufacturers
 - Power behind Delta message is that no one is talking, theme music primarily – could show someone collect the data for the audit and then having a report and being pleased with that and showing it to a customer, then a construction site showing improvements being done.
 - Message to be communicated is that it is through ASHRAE members that building owners will be convinced to pursue bEQ
 - The message is that engineers either have to be able to sell it or building owners need to want it.
 - Can't rely on design engineers to sell bEQ
- Video could be provided to CRCs and DLs and shown at ASHRAE meetings.

AI: Pratt to circulate the video ideas from this meeting to the committee for review and additional comment

b. Web Page development (attachment)

- Test page
- Copy is starting to introduce who we are and what to expect
- Stay Updated tab is a short term thing to allow people an outlet to stay informed

AI: Lilas to update copy for course and web portal based on updated fact sheets

Motion #1: Hugh moved that the web site concept be approved.

Vote: Motion passed by voice vote

Background: web page will be a living breathing entity

- c. Updated Fact Sheets (attachment)
 - Looking at copy today
 - Will be put on pretty template after approved

Motion #2: Hugh moved that the APPA fact sheet be approved as modified in the meeting.

Vote: Motion passed by unanimous voice vote

Motion #3: Hugh moved that the GGAC fact sheet be approved as modified in the meeting.

Vote: Motion passed by unanimous voice vote

Background: Fact sheets can/will be fine tuned through feedback once distributed.

Motion #4: Hugh moved that the Technical fact sheet as modified in the meeting

Vote: Motion passed by unanimous voice vote

2. Methodology Updates

a. Beta Test Procedures

- No formal plan for test procedures, but the suggestion is that engage three groups of users.
- First, members of committee willing to go in and poke around and make sure it has features expected.
- Second, folks like Ross and others who have been using spreadsheet and possible reenter data from previous jobs and make sure it is working from their perspective.
- Third, bring in people who are not that familiar with bEQ and have them look at it. Perhaps engineers and/or property managers. Not sure how to engage this group.
- Fourth, staff members to test it both from a committee perspective (Lilas Pratt) and also from unfamiliar standpoint (new staff members in technology).
- Also suggested that GGAC MBO on bEQ be used to fulfill the third group.
- Let's try to line that up prior to June 2 meeting.

b. Comparison of bEQ to Standard 214

- Several folks on the committee were provided access to Standard 214 to assess whether or not there are any incompatibility issues.

3. Review of Action Items (see Attachment)

4. Next Monthly meeting

April 7, 2017 Monthly Web Meeting

- **AI 1: Pratt** to look at web portal accordion label descriptions for possible suggested heading changes
- **AI 2: Eley** to provide a testing protocol document for the web portal by June 2, 2017
- **AI 4: Pratt** to provide label concept design to Stephen Roth for generation by the web portal
- **AI 6: Marketing** to redo the final fact sheets with new collateral once feedback has been received from the committee and outside entities.

January 29, 2017 Las Vegas Winter Meeting

- **AI 1: Building EQ Committee** to develop a median EUI for laboratory buildings.
 - **1a: Bohanon and Eley** to coordinate with TC9.10 and TC 9.7 to develop questions on laboratory variables affecting energy use.
 - **1b: David Handwork** of TC9.7 and **Wade Conlan** of TC9.10 to survey their TCs for laboratory variables affecting energy use.
 - **1c: Bruce Hunn** to track progress on development of laboratory variables affecting energy use
 - **1d: Methodology Subcommittee** to request a survey by APPA of membership to report back with energy data and critical variables for laboratory energy use.
 - **1e: Methodology Subcommittee** (or designee) to analyze the data on laboratory energy use via regression analysis to determine significant energy factors and establish equation for determining median by September 2017 for use by initial participating campuses in the Adapt bEQ course.
- **AI 2: Crowther** to develop a list of target sales channels
- **AI 3: Crowther and Keen** to develop a targeted marketing program
- **AI 5: Crowther, Bohanon, and Keen** to develop a proposed plan on the “products” of the Building EQ program for review by the committee.
- **AI 10: Building EQ Committee** to develop presentation/training material on Building EQ and upcoming changes for use at the Spring & Summer CRCs.
 - **10b: Bohanon and Crowther** to coordinate with DRCs regarding Spring CRC presentations.
 - **10c: Bohanon and Crowther** to attend DRC meeting in Long Beach to coordinate presentation with CRC agendas for Summer CRCs
- **AI 11: Bohanon** to update DL slides for DLs presenting Building EQ.

December 2, 2016 Monthly Web Meeting

- **AI 1: Reports and Sales Subgroups** to review products to see if there are other products/reports that can be sold to users (e.g., certificates).
- **AI 2: Sales subgroup** to determine pricing strategy for reports and labels, considering volume, users, location, selected partners, etc.
- **AI 3: Bohanon, Crowther** to address production and quality control as the process moves from worksheets to on-line data entry.

September 20-21, 2016 Atlanta Interim Meeting:

- **AI 4: Eley/Bohanon** to finalize the ventilation rate data for the COMNET website.

- **AI 8:** Pratt to send Boyd a copy of the workbooks for the first full IO/AD awarded to city of Orlando buildings for use in determining web portal outputs.

January 24, 2016 Orlando Winter Meeting:

- **AI 3:** Methodology Subcommittee to explore the DOE Asset Score and report back to the full committee. (On-going)

bEQ Committee June Monthly Call

Date: Fri, Jun 2, 2017

Time: 10:00 AM - 11:00 AM EDT

Participation: Bohanon, Crowther, Keen, Boyd, Eley, Hogeling, Hunn, Tucker, Kushagra, Baccini

Guests: Roth, Mathew Coalson

Staff: Pratt, Walters, Gilstrap, Ratcliff, Sigman

Meeting convened at 10:02am EDT

Agenda:

- 1) Web Portal Update – Stephen Roth/Charles Eley
 - a. Latest changes
 - Awesome demonstration of portal
 - Suggest showing scores above menu constant display
 - Suggest different date format on metered data sheets
 - Working on finishing up the calculations/connecting to UI
 - Working on validation which will engage upon hitting “save” button
 - Working on reports
 - b. Beta Test timing
 - Expected start of beta is June 15
- 2) Marketing Update – Lauren Walters/Krystin Gilstrap
 - a. Webpage status
 - b. Video proposal

Motion 1: Crowther moved and Boyd seconded to approve the concept of the video as outlined in the power point presentation (see attachment).

Discussion:

Actual story boards will be sent out to the committee for review by the committee.

Feedback and comments should be sent to Lilas by Friday, June 6.

Vote: Passed by unanimous voice vote, 5-0-0, CV

- 3) Other Updates
 - a. Seminar 13/APPA Presentation – Hoy Bohanon/Hugh Crowther
 - Seminar 13 – Sunday in Long Beach at 1:30pm
 - Slides being finalized now
 - b. Adapt bEQ Course – Hoy Bohanon/Lilas Pratt
 - List of potential universities /chapters to do the course
 - c. Laboratory Buildings – Hoy Bohanon/Bruce Hunn
 - Working on how to do surveys and get the information
 - Hope to have a vision on how to get this done by Long Beach
 - TC 9.10 (Tuesday afternoon, 3:30pm)

Meeting adjourned at 11:00am EDT