



Date: December 3, 2015

Weekly Agenda Date: December 8, 2015

DEPARTMENT HEAD / CITIZEN: <u>Supervisor Jeremy Taylor</u>		
SUBJECT: <b>Energy Conservation</b>		
<b>ACTION REQUIRED:</b>		
Approve Ordinance <input type="checkbox"/>	Approve Resolution <input type="checkbox"/>	Approve Motion <input type="checkbox"/>
Give Direction <input type="checkbox"/>	Other: Informational <input checked="" type="checkbox"/>	Attachments <input type="checkbox"/>

**WORDING FOR AGENDA ITEM:** Conservation Measures, Energy CAP, and Building Automation

**EXECUTIVE SUMMARY:** I hope that the Board through energy efficiency projects, building automation systems, and conscientiousness of usage would continue the process of reducing costs in energy for taxpayers and as good environmental stewards. I would not only reference the Facility Improvement Master Plan as developed by the Baker Group but also steps that the Board has already taken:

- Saving taxpayer dollars by correcting coding and aligning budgets to 5-year averages for utilities
- Contracting with Energy CAP in order to start tracking utilities, cost avoidance, budgeting, anomalies, commodity average unit costs, usage trends, demand charges, etc.  
(There are bi-weekly meetings for implementation occurring now).
- Replacement of every interior light with LEDs and an approximate 3-year payback\* by becoming the first all-LED county in the State of Iowa
- Examination of a Woodbury County Energy Summary Report with cost comparisons.
- Consideration then of closing a facility with an incredulous \$4.28/sq foot utilities cost (Prairie Hills) and studying how to design more efficient space with an expansion of the LEC.

*\*The Board should budget some anticipated savings per Supervisor Clausen's suggestion at a previous meeting based on a May 31, 2016 installation of LEDs.*

The next step to look at is **Building Automation**, both for the comfort and efficiencies of our HVAC. Nearly every system is old, outdated, in deteriorated condition, or non-functioning. Our building superintendent has identified multiple 2017 CIP Projects related to building automation.

**BACKGROUND:**

ENERGY CAP...I am including a PowerPoint that Kenny Schmitz and Rene Pettigrew (Building Services), Doug Bock (IT), Jean Jessen (Auditor's Office), and I sat in with representatives from Energy CAP, Inc. This item is informational only to share what we learned on December 1, 2015.

BUILDING AUTOMATION...I also had a meeting with Kenny Schmitz, representatives from The Baker Group, and (by telephone) a Mid-American key account manager on December 1 as relates to building automation systems to determine what we have, what opportunities exist, etc. We have some Allerton (Star Control), Johnson Controls (Siouxland District Health wherein I have questioned a \$28,000 annual service contract), and some Dunwell. Not all "talk" to one another and many have lost control of their intended purposes.

The level of rebates is "custom," meaning that there is no set dollar amount available as there is for a "prescriptive rebate," e.g. \$20 per LED fixture as approved by DLC (Design Lighting Consortium). For "custom rebates" which are more typical for complex projects, an outside company must come and demonstrate an audit with potential energy savings through retrofits and subsequently reduced expenditures. Typically, Mid-American is going through a company called Clear Results but custom rebates sometimes take more than 12 weeks just to identify what would be eligible. An expedited process called Retrofit Commissioning can expedite this to as soon as 6 weeks when the study can be completed, and another 6 weeks with the results of potential rebates or results. The County had had Nexant do this (a previous study from Mid-American) but followed through on very little of what the reports identified. Nexant reports are no longer allowed to be utilized.

There is also a potential that The Energy Group, an alternative, may be utilized and the key account manager from Mid-American should be able to let us know which company can respond most quickly to our needs by the first week of January, 2016.

We also learned from The Baker Group who is implementing \$2.5 million of projects with the Sioux City Schools, holds the State Master Contract with the Iowa Energy Bank, and has many other projects around the state, the following: building automation systems must typically be in conjunction with other projects, e.g. replacement of steam traps, utilization of outdoor air economizers, etc. in order to maximize rebate potential.

**FINANCIAL IMPACT:** There is absolutely no cost to having rebate potentials identified by Mid-American, but there are no potential rebate opportunities unless this step is taken.

**RECOMMENDATION:** Information only

**ACTION REQUIRED:** Information only.



## Project Kickoff Meeting

County of Woodbury, IA



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## Agenda

1. Introductions, Contract Review
2. Expectations, Timelines
3. Initial Data Requirements, Data Conversion, Software Requirements
4. Resources: FTP, Download Site, Help, Support
5. Next Steps: Regular Meetings, Action Items

# 1. Introductions

## EnergyCAP, Inc. Stakeholders

Name	Title & Contact Info	Responsibilities
Dan Behringer	Senior Project Manager 877.327.3702 x68 <a href="mailto:Dan.Behringer@EnergyCAP.com">Dan.Behringer@EnergyCAP.com</a>	<ul style="list-style-type: none"><li>• Project lead</li><li>• Primary point of contact</li><li>• Manage project: ensure deliverables are reviewed and approved in timely manner</li><li>• Facilitates communications</li></ul>
Dave Ulmer	Senior Project Manager x40 <a href="mailto:David.Ulmer@EnergyCAP.com">David.Ulmer@EnergyCAP.com</a>	<ul style="list-style-type: none"><li>• Provides assistance and backup as required</li></ul>
Ryan Ohlson	Chief Operating Officer x33 <a href="mailto:Ryan.Ohlson@EnergyCAP.com">Ryan.Ohlson@EnergyCAP.com</a>	<ul style="list-style-type: none"><li>• Supervises project managers</li><li>• Facilitates resolution of issues that may arise</li><li>• Ensures quality</li></ul>
Phil Kolb	Marketing Account Manager x46 <a href="mailto:Phil.Kolb@EnergyCAP.com">Phil.Kolb@EnergyCAP.com</a>	<ul style="list-style-type: none"><li>• Sales contact for contract questions</li></ul>

# 1. Introductions

Client Stakeholders – Who are the main project contacts?

Role	Responsibilities
Project Sponsor	<ul style="list-style-type: none"><li>• Project approval to start</li><li>• Approval of project change orders as necessary</li><li>• Approve or delegate approval that project has completed satisfactorily</li></ul>
Project Manager	<ul style="list-style-type: none"><li>• Primary point of contact</li><li>• Manage project: ensure deliverables are reviewed and approved in timely manner</li><li>• Ensure critical success factors are identified, validated, and approved</li><li>• Facilitates communications</li></ul>
IT Support	<ul style="list-style-type: none"><li>• Ensure infrastructure and data requirements are identified and completed</li><li>• Provide technical expertise</li><li>• Install systems and software</li></ul>
Accounting Support	<ul style="list-style-type: none"><li>• Understand accounting and workflow functions of system</li><li>• Provide expertise on accounting codes and structure of data in accounting system</li><li>• If necessary, provide interface specifications</li></ul>
Additional Support	<ul style="list-style-type: none"><li>• Identify and approve reporting requirements</li><li>• Conduct testing via scenarios and ad hoc</li><li>• Provide feedback and sign off on key deliverables</li></ul>

# 1. Contract Review

## License Details

- Number of Meters: 250

Base Features		
Account & Meter Tracking	Project Tracking	Budgets & Forecasts
Benchmarking Charts	Reports, Charts & Graphs	Counters
Bill Audits	Setup Wizards	Custom Spreadsheets
Data Import Templates	Supported APIs	Energy Contract Administration
Electronic Bill Import	Target Comparison	Energy Procurement
Energy Dashboard	Tree View Navigation	Issue Tracker
ENERGY STAR Benchmarking	User Permissions	Rate/Tariff Analysis
Greenhouse Gas Tracking	Weather Data	Report Distribution
PowerViews™	Workflow Management	Unit System (Editing)

# 1. Contract Review

## Advanced License Features

### Advanced Features – Included

Cost Avoidance (M&V), Calendarization, Normalization, Energy Use Intensity, Use vs Weather

### Advanced Features – Optional

Accounts Payable or General Ledger Export

Chargebacks, Submeters, Bill Splits

Interval Data, Meter Data Import

Report Designer

Historical Bill Import

Bill CAPture

# 1. Contract Review

## Implementation Details

- Project Management Services
  - Setup/configuration of EnergyCAP
  - Project-based implementation assistance

## Training Details

- Online Training – Five hours
- Annual Catalyst User Group Conference
  - April 26-28, 2016 in State College, PA
  - [www.EnergyCAPCatalyst.com](http://www.EnergyCAPCatalyst.com)

**EnergyCAP Maintenance Agreement (ECMA)** – Ongoing upgrades and support

**Hosting** – Database to be hosted by County of Woodbury

## 2. Expectations

- What are the primary business drivers behind your purchase of EnergyCAP?
- Are there any project deadlines/mandates?
- Is EnergyCAP replacing existing software or providing new functionality?
- Implementation expectations (project resources, division of labor)

## 2. Timelines

Most projects are 4-8 months in length

Major Project Tasks:

- Basic Setup / Configuration
- Client Hosted Software Installation
- Import Historical Data
- Advanced Setup / Configuration
- Training

## 2. Timelines

### Key Risks that Threaten Deadlines

Risk
Ownership of Project
Access to Data
Organization of Data
Project Buy-In
Preparation for Regular Meetings
Turnover in Personnel

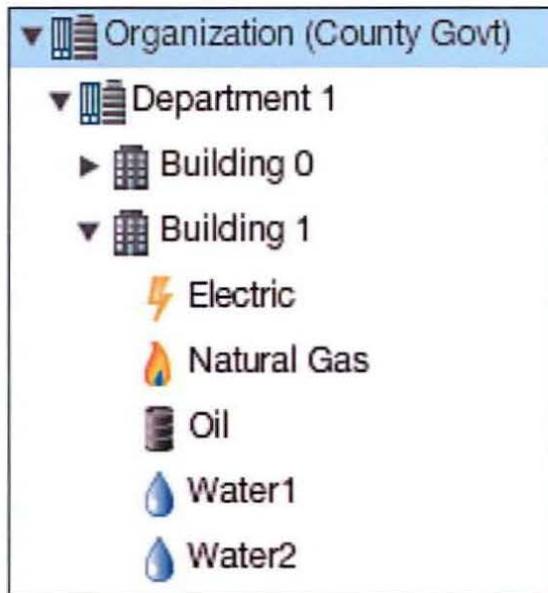
### 3. Common Terminology

Term	Definition
ECO	EnergyCAP Online (Web Version)
ECE	EnergyCAP Enterprise (Installed Version)
ECI	EnergyCAP, Inc. (Company)
Account	Purchased utility account, vendor account, deregulated account, internal chargeback/recharge account
Meter	A meter is a point of service as itemized on the bill and tracked in EnergyCAP as a meter/logical device and includes points of service for which no physical meter exists, such as sewer, fire lines, outdoor lighting, fuel oil tanks, storm drainage, ISP and telephone service, etc. Meter records that are used in split, calculated, and virtual bill processes for Chargeback and Cost Allocation purposes are considered meters.
Buildings	Physical Structures
Places	Level of the Facility Tree
Cost Center	Level of the Accounting Tree
Hierarchy	Organization of Data using a Tree Structure

### 3. EnergyCAP Hierarchy Setup

EnergyCAP is organized into two primary hierarchies/trees:

#### Buildings & Meters



#### Accounts



## 3. Data Setup and Migration

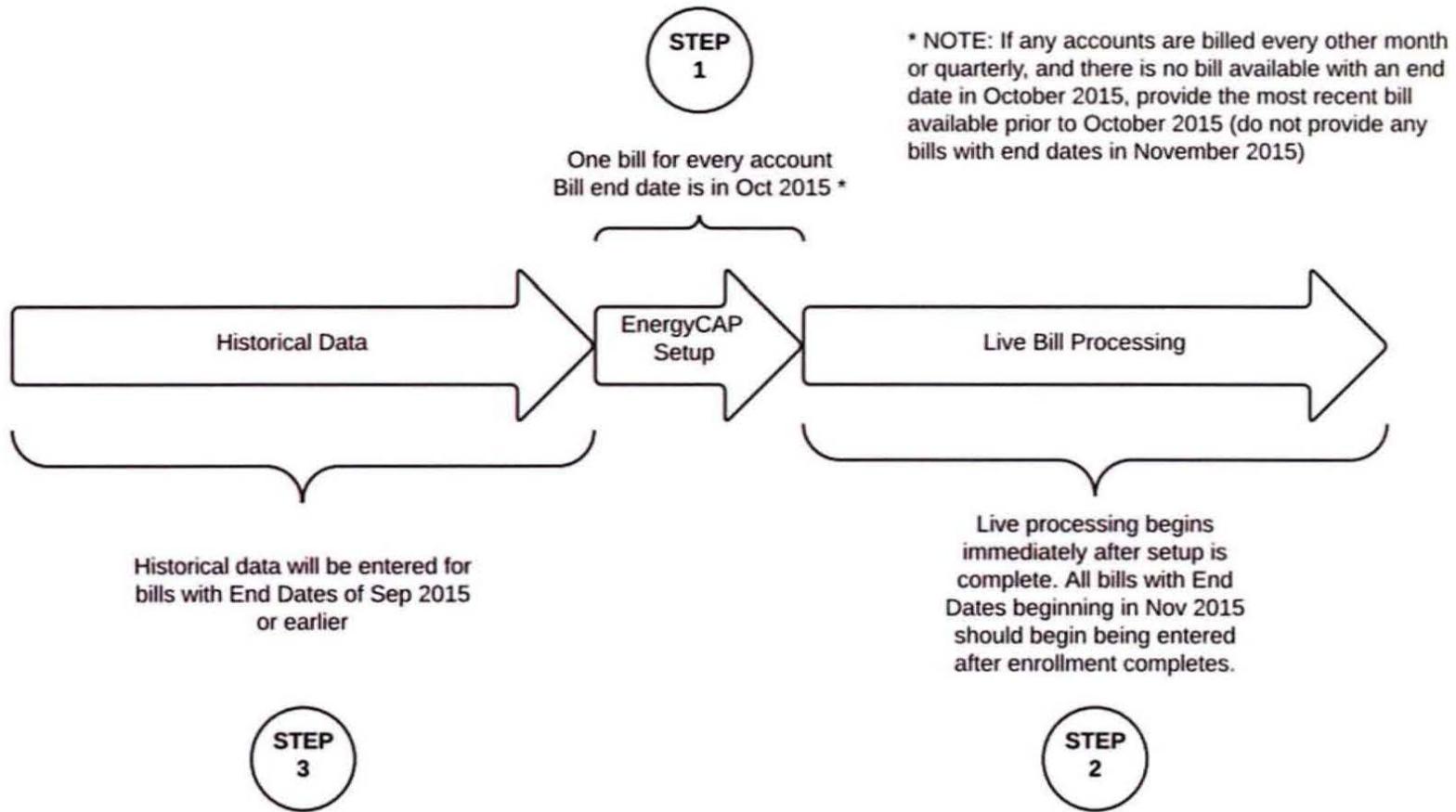
### Setup Data

- Most setup data can be collected from PDF images of existing bills
  - One bill per account
  - All bills with end date / read date of in Oct 2015

### Historical Data

- EnergyCAP to provide historical data import sheet format
- Woodbury to prepare sheet with historical data

### 3. Data Setup and Migration



### 3. Software Requirements

- Web browser with Adobe Flash enabled
- GoToMeeting®
- Client Hosted
  - Microsoft SQL Server 2008R2 or 2012
  - Windows Server 2008 with IIS 7
- Client is responsible for all hardware/software upgrades to run EnergyCAP. Changes to requirements are included in release notes.

## 4. Resources: FTP, Help, Support, Releases

**Support FTP: Exchange files**

**Knowledge Transfer Document (KTD)**

**Help Manual**

- ECE: [Help.EnergyCAP.com](http://Help.EnergyCAP.com)
- ECO: [Docs.EnergyCAP.com](http://Docs.EnergyCAP.com)

**Support Resources**

- [www.EnergyCAP.com/Support](http://www.EnergyCAP.com/Support)
- Sample Reports: [www.EnergyCAP.com/SampleReports](http://www.EnergyCAP.com/SampleReports)

## 4. Resources: FTP, Help, Support, Releases

### Training Resources

- Training Videos
- Annual Catalyst Conference: April 26-28, 2016 in State College, PA. [www.EnergyCAPCatalyst.com](http://www.EnergyCAPCatalyst.com)

### Release Schedule and Notes

- [www.EnergyCAP.com/Support/Releases](http://www.EnergyCAP.com/Support/Releases)

## 5. Next Steps: Regular Meetings

### Schedule Next Meeting

- Regular Meetings (Bi-Weekly)
- Who should attend?
- **Very Important:** For project success and on-time completion it is important for both parties to be prepared for meetings.

## 5. Next Steps: Action Items

### ECI Action Items

- Propose meeting times
- Send KTD Template
- Send Login and FTP Information
- Send Installation Instructions

### County Action Items

- Start to Gather Data – PDF images (one per account)
- Collect Building/Site and Accounting Structure information

**Thank you. We look forward to  
working with you!**