



Building Energy Performance Program High Performance Pathway Instructions

These instructions are provided to use with the High Performance Workbook. These are guidance materials for printing and reviewing purposes only. Do not submit any information handwritten or entered onto these pages to the Office of Sustainability. **A report will only be accepted when submitted via the provided excel High Performance Workbook.**

How to use these Instructions

As you review and fill out the excel High Performance Workbook, you may use these instructions for additional clarity, comments, and examples of what is required. The instructions are broken down into sections that reference different worksheets in the High Performance Workbook.

- Introduction
- High Performance Path
- Contact Information
- Building Overview
- Major Systems
- Data Review

Introduction

All buildings pursuing an exemption from the City's Building Energy Performance Policy through a high-performance pathway must submit documentation to the Office of Sustainability (OOS). This High-performance Exemption Submission template must be completed and submitted to meet this requirement.

Complete all the fields on all the tabs. There are times when extra space/fields are provided, so please read the directions. Also, there are fields marked as "Optional" that are not required to be fully compliant. If a field is not applicable to a building, please use "N/A" or do not choose from the dropdown menu.

Once this template is completed, please submit it and all necessary attachments to prove high-performance to TuneUps@phila.gov with the OPA number in the subject line. If you do not know the building's OPA number, please visit www.atlas.phila.gov.

High-performance Pathway Details

The high-performance pathways and required documentation are as follows:

LEED for Building Operations & Maintenance v.4 (Gold or Platinum)

- LEED certificate for Building Operations and Maintenance (O & M) issued by United States Green Building Council (USGBC).
- LEED scorecard.
- The completed High Performance Workbook

Net-Zero Energy Certification

- Net-Zero Energy Certification issued by International Living Future Institute (ILFI), with any summary documentation.
- The completed High Performance Workbook

Utility retro-commissioning program

- Documentation, including final approval by PECO, that provides evidence of completed whole building retrocommissioning, as defined in Pennsylvania Act 129 of 2008 as amended or subsequently altered for additional phase.
- The completed High Performance Workbook

Full retro- or recommissioning procedure

- Documentation by the provider who conducted the retrocommissioning or recommissioning demonstrating (a) that it covered at least seventy-five percent (75%) of the Covered Building's square footage and (b) that it met the energy reduction requirements promulgated in Phase 3 of Act 129.
- The completed High Performance Workbook

15% Energy Savings*

- ENERGY STAR Statement of Performance (SEP) for three calendar years evidencing a site EUI reduced fifteen percent (15%) compared to the highest weather-normalized EUI in the three referenced calendar years prior to the Tune-up date.
- A cover letter verifying the accuracy of the reporting and signed by any person possessing the qualifications of a Specialist.
- The completed High Performance Workbook

**For building owners pursuing the 15% energy savings pathway may request a non-guaranteed extension one year to submit the required documentation. No sooner than 180 days prior to the Compliance Deadline, the owner shall provide in writing and in a form acceptable to the OOS, evidence sufficient to the OOS that the building will meet the exemption requirement, and if the application fails the Covered Building shall conduct a Tune-up within one year of the date of its exemption denial.*

15% Energy Savings (using C-PACE Financing)

- For C-PACE certification, the verification by the Philadelphia C-PACE Program Administrator regarding the annual energy savings projection approved as part of the building's C-PACE financing, if C-PACE financing was used for the reduction.
- The completed High Performance Workbook

Low Site EUI

- A copy of the Statement of Energy Performance (SEP) for each of the qualifying years demonstrating a weather-normalized site EUI equal to or less than twenty (20) kBtu/sq for at least two of the three preceding calendar years to the Compliance Date.
- Written validation of the SEP data by any person with Specialist qualifications.
- The completed High Performance Workbook

ENERGY STAR Certification

- Either (a) a copy of the EPA-issued ENERGY STAR Certificate of Achievement or (b) the congratulatory email confirming certification.
- Either (a) a copy of the application for Certification or (b) the Statement of Energy Performance (SEP) with the same year-ending date as the application.
- The completed High Performance Workbook

Manual Ongoing Commissioning

- On-going commissioning plan (with all the elements required in LEED Operations and Maintenance v4 (or current edition) Ongoing Commissioning Energy and Atmosphere credit).
- One year of quarterly (or more frequent) reports that detail findings from efforts and corrections made.
- The completed High Performance Workbook

Automated Active Optimization (CCx)*

- Description of the system(s)
- One year of quarterly (or more frequent) reports generated by the automated system that include: (a) Faults/issues detected; (b) Date of each fault/issue was detected; (c) Date of correction/repair for each fault/issue, if corrected/repared; (d) Staff/vendor notes on what was done to remedy each fault/issue (optional).
- The completed High Performance Workbook

NOTE: If base-building lighting systems are not covered by the automated system, Owner may submit alternative documentation to demonstrate manual ongoing commissioning. This documentation can either be an ongoing commissioning plan and reports as referenced in Section 7.d.vi.i or a written description of the protocols to ensure lighting systems and their use reflect the occupant and space needs.

**For tune-ups scheduled in calendar years 2021 and 2022:*

For building owners pursuing the active optimization pathway may, upon application and no sooner than 180 days prior to the Compliance Deadline and approval by OOS, receive an extension of no more than two years from the Compliance Deadline to implement the Active Optimization and collect relevant data.

Extension applications under this subsection include: Description of the type of program; Systems to be actively optimized; Timeline for launch and data qualification; and Verification by a person possessing Specialist qualifications.

Energy Audit*

- An audit report and cover letter signed by the energy audit lead of an ASHRAE Level II Commercial Building Energy Audit (or equivalent). This letter must list all the no-cost/low-cost energy efficiency measures (defined as providing a simple payback of three years or less) identified in the audit and verify implementation of these measures.
- The completed High Performance Workbook

**Building owners pursuing the ASHRAE Level II Commercial Building Energy Audit pathway may request a non-guaranteed extension of 1 year to submit the required documentation related to the implementation of the no-cost/low-cost energy efficiency measures, defined as providing a simple payback of three years or less, identified in the audit. The owner shall provide sufficient evidence that the building will meet the High Performance requirement. If the requirements are not met, the Covered Building must conduct a Tune-up within 1 year of the date of its High Performance pathway denial.*

Contact Information

Contact details for the Building Owner and the Primary Building Contact are requested in the Tune-up Report Workbook. If the Building Owner is the same individual as the Primary Building Contact, you do not need to enter the same information twice.

Building Overview

Inputs in this section are for basic building information and characteristics.

General Information

This includes details such as Year Built, GFA, Occupancy, and more. The [OPA Property Assessments Tool](#) can be used to search for some of these inputs. . This is also where you will indicate whether or not this building shares energy or water meters with another building on the OPA parcel.

Note: High Performance Workbooks are required for each individual building, even if they share a primary heating or cooling system such as a central plant.

Fuel Sources Used

These are Yes or No inputs for various fuel sources powering the building. If you have on-site solar PV, please enter the total amount of kilowatts (kW) installed as a whole number.

Space Use (Up to five largest energy users)

Enter values to identify building space types impacting energy use (e.g., offices, data centers, laboratories, food service) and their floor area. Available use types correspond to the property types in [Energy Star Portfolio Manager](#).

Note: For College/University, choose this as your primary space use but also include the other significant spaces uses in the building such as Office, Laboratory, etc.

Occupancy Use

Enter values for the point at which the desired temperature of space is set when occupied, or setback when unoccupied, for both heating and cooling seasons.

Building Automation Systems

Building Automation Systems (BAS) are control systems that consist of sensors and actuators that are programmed using control logic to monitor and regulate operation of building equipment and systems (e.g., HVAC, lighting, and plug loads) in a coordinated fashion to optimize performance and energy use. Enter values to define whether you have a BAS and the type of BAS.

Note: To define the BAS “Type”, there is a dropdown that is limited to two options (Direct Digital Control, Pneumatic). If you have multiple systems of different types, please include this information in the Comments section.

Tenant Information

This section seeks to understand how the tenants are engaged with building energy efficiency. Please share any tenant-owner programs or leasing structures if relevant.

Major Systems

This section is an inventory of the building HVAC, Hot Water, Lighting, and other systems. The first and second column are for the primary systems that service your base building. Enter values in the second column if you have a Heating or Cooling Plant and need additional space to define your Heating or Cooling equipment.

Space Use Served – Referencing the space use types defined in the “Building Overview”, enter values for the space use types that the systems are servicing.

Occupancy Schedule – If tenants with a different schedule than the main building occupy the space use served by the major systems, please note this here.

Type – A dropdown of options will appear. If “Other”, please define the Type of system in the “Notes” section.

Size – Enter the system size threshold, or output capacity, as a numerical value.

Size (Unit) - Define the unit of measurement for the size. Ex. BTU, Ton, MBH.

of Pieces of Equipment – Enter the number of pieces of the same equipment for the system.

Age – A dropdown of options will appear to define the approximate age of the system.

Efficiency Rating* - Enter the efficiency rating as a numerical value.

Efficiency Rating (Units)* - Define the unit of measurement for efficiency. If “Other”, please define in the “Notes” section. Ex. AFUE, COP.

Condition – A dropdown of options will appear to define the condition of your equipment

Notes – For any additional comments about your system

*Optional Inputs

Note: If you are unable to clearly describe all of your Major Systems, use the table labeled “Other Major Equipment of Systems (Not referenced above)” for more details and “Additional Major Systems Notes (Optional)” for descriptions and clarity.

Data Review

Inputs in this section ask that the Tune-Up Specialist review the property’s most recent benchmarking submission in ENERGY STAR Portfolio Manager, monthly energy bills, and monthly water bills to confirm that all information is correct and there are no abnormalities in the billing data. There are two optional sections, Maintenance Review and Greenhouse Gas Emissions.

To achieve compliance, one must verify accuracy of benchmarking data in ENERGY STAR Portfolio Manager. Please see instructions here: [How do I save my Verification information? \(force.com\)](#)