

**A. PROJECT OBJECTIVES**

The goals of the Location, Location, Efficiency (*L.L.E!*) program are to 1) Demonstrate how energy efficiency increases profitability of commercial buildings; 2) Track energy savings impact for up to 200 buildings in Wisconsin through retrofits or commissioning; 3) Increase Wisconsin's building footprint in the Better Buildings Challenge, with an individual building goal of 20% energy reduction; 4) Make lasting improvements to Wisconsin's existing energy efficiency framework by coordinating partners and integrating various Department of Energy (DOE) tools, and 5) Assist customers in benchmarking using Portfolio Manager, piloting the Standard Energy Efficiency Data (SEED) Platform™, and using Asset Score to conduct building energy audits or other DOE tools.

**B. TECHNICAL SCOPE SUMMARY**

Milwaukee will deploy Department of Energy tools and practices in Class B&C Offices, schools, municipal buildings, and small commercial to demonstrate the value of building energy efficiency. Programmatic activities will begin in the City of Milwaukee and expand statewide through various partner organizations (Partners). Partners will recruit participants for the Better Buildings Challenge. Partners will bundle energy efficiency services including project development, financing, Operations and Maintenance support, and deployment and awards. Milwaukee will incorporate various DOE tools into a Deep Energy Efficiency Program (DEEP).

**C. TASKS TO BE PERFORMED**

**BUDGET PERIOD (BP) 1: PLAN**

**TASK 1: DEVELOP PROJECT MANAGEMENT PLAN AND WORK PLAN**

Develop a cohesive framework that addresses how DOE tools align and support the activities associated with this project. This task includes the creation of a workplan and timeline for a DEEP including Benchmarking, Property Assessed Clean Energy (PACE) finance, and a pathway for buildings to proceed from energy analysis (benchmarking, audits, evaluation) to retrofit planning (procurement and technical assistance) to operations and maintenance such as retro-commissioning (RCx) or Existing Building Commissioning (EBCx) to tracking impact (cost, energy, labor savings, etc.) to recognition (awards, deployment, outreach).

D1.1 Initial Project Management Plan (PMP) to be maintained throughout the course of the project (20 days from award, BP1, Q1)

D1.2. Workplan outlining specific DOE tools and specific partner roles (BP1, Q2)

D1.3 Contract with primary vendor to deliver DEEP (BP1, Q4)

D1.4. PMP Update 1 (BP1, Q4)

D1.5. PMP Update 2 (BP2, Q4)

**Subtask 1.1: Develop Project Management Plan**

M1.1. Submit initial PMP to project Officer for review (20 days of award, BP1, Q1)

M1.2. Submit PMP update (BP1, Q4)

M1.3. Submit PMP update (BP2, Q4)

**Subtask 1.2: Develop Work Plan and Evaluate Tools**

M1.4: Confirm selected DOE tools with DOE project officer. The City and DOE will select among SEED, Asset Score, Advanced Energy Resource Guides (AERGs), Better Buildings Resources, Workforce Guidelines, Procurement Specifications, Better Buildings Challenge recruitment (BP1, Q1)

M1.5. City submits Work Plan and framework identifying specific project partners, DOE tools, and anticipated duties (BP1, Q2)

**Subtask 1.3: Assess and Adopt Customer Process Management Tool**

M1.6. Partner's customer relationship management (CRM) tool evaluated for compatibility with DOE tools and other project activities such as O&M Support. (BP1, Q3)

M1.7. If Partner's CRM tool is insufficient, adopt a simplified customer management process (BP1, Q4 only if needed).

**Subtask 1.4: Negotiate and Execute Contracts with Vendors**

M1.8. Negotiate and execute first round of contracts with vendors to deliver DEEP including benchmarking.

**Budget Period 1 Go/No-Go Decision Point (BP1 Q2):** The framework and selected customer process management tool have been presented to DOE, and DOE has approved the framework and tool for implementation over the remaining term of the award. A PMP has been submitted and approved by DOE. The PMP outlines all key partner goals and activities, project milestones, dates, dependencies and includes spending targets for each milestone and budget period.

**BUDGET PERIOD 2: INTEGRATION AND LAUNCH**

**TASK 2.0: INTEGRATION**

**Task Summary:** Bundle and integrate 1) customer engagement and customer defined goals with 2) benchmarking, 2) energy audit, 3) financing, 4) retrofit or operational improvements, 5) building operations staff development. Create a clear customer path for improving their building and reducing energy consumption, depending on its size and use. Create clear pathways for Existing Building Commissioning (ECBx), standard retrofits, and/or deep retrofits.

D2.1: Documented configuration of CRM to incorporate DOE tools and DEEP. (BP2, Q1)

D2.2: Copy of training content (BP2, Q2)

D2.3: Data inputted into DOE tool such as Asset Score for at least 10 buildings (BP2, Q3)

**Subtask 2.1: Incorporate DOE Tools**

M2.1 DOE tools incorporated into DEEP (BP2, Q1).

**Subtask 2.2: Train Staff**

M2.2. Staff trained on DOE tools and DEEP (BP2, Q2)

**Subtask 2.3: Complete Trial Projects**

M2.3 At least five buildings analyzed using DOE tools such as Asset Score (BP2, Q3)

**Subtask 2.4: Rollout Milwaukee Better Buildings Challenge Website**

M2.4 New Milwaukee Better Buildings Challenge website launched to public offering DEEP and O&M support services (BP2, Q4)

**TASK 3.0: OPERATIONS AND MAINTENANCE (O&M) SUPPORT**

**Task Summary:** Develop a matrix outlining the appropriate pathways for Existing Building Commissioning (ECBx) as an alternative/addition to retrofits. Develop a matrix outlining how available training and educational resources apply for building staff. Participate in planning for DOE's Retro-commissioning Campaign.

D3.1: Documentation of first five RCx/EBCx buildings (BP2, Q3)

D3.2: Documentation of Work Study program with technical college (BP2, Q3)

D3.4 Documentation of DOE tools into curriculum of local technical college. (B2, Q3)

**Subtask 3.1: Provide Seminars to Building Owners**

M3.1 Provide seminars to building owners to support energy management and control strategies for energy savings such as Existing Building Commissioning, monitoring-based commissioning, Re-tuning and retro-commissioning. Survey applicable workshops and other degree and certificate programs and keep an updated central resource for building staff with education and training offerings. (BP2, Q2)

**Subtask 3.2: Partner with Technical College and Establish Work Study Program**

M3.2 Establish work study opportunities for students through partner technical colleges. Based on partnerships, identify student candidates for work study and develop pathways for participation. (BP1, Q4)

**Subtask 3.3: Incorporate DOE Tools**

M3.3 Incorporate DOE tools selected in subtask 1.2 into curriculum of local training partners (BP2, Q2)

M3.4 Participate in DOE Retro commissioning Campaign (subject to DOE timeline)

**TASK 4.0: TECHNOLOGY INTEGRATION**

**Task Summary:** L.L.E! will work with partners to incorporate into energy efficiency evaluation and selection processes or policies for those technologies identified by US DOE's Building

Technology Office as well as technologies developed through local partners. L.L.E! will catalogue Wisconsin and American made building efficiency products, work with Focus on Energy to develop efficiency programs, and deploy them to customers via the L.L.E! DEEP. Through this integration, energy efficiency retrofit projects create not only installation jobs, but jobs throughout the supply chain. L.L.E! will do the same for RcX/EBCx tools and technologies, such as user-friendly monitoring and controls interfaces.

D4.1 Catalogue of Wisconsin and American made building efficiency products and other technology-related products such as new technology specifications, energy performance policies or entries into the TPEX. (BP2, Q4)

D4.2 List of Focus on Energy incentive programs developed in partnership with L.L. E. (BP3, Q4)

**Subtask 4.1: Incorporate DOE procurement, HITs, or Specifications into Energy Audits**

M4.1 Incorporate local high impact technology performance information into audit and evaluation tools or processes. Where possible, support the use of Open Studio platform-based products.(BP2, Q4)

M4.2 Catalogue Wisconsin and American made building efficiency products, work with Focus on Energy to develop performance specification (as applicable) and energy savings data to pre-qualify them for incentives, and deploy them customers via the L.L.E! contractor network. (BP3, Q1)

**Budget Period 2 Go/No-Go Decision Point (BP2 Q4):** The LLE Program has been launched to the public and has completed 30-50 test buildings in multiple commercial sectors..

**BUDGET PERIOD 3: ACCELERATE**

**TASK 5.0: DEPLOYMENT AND AWARDS**

**Task Summary:** Conduct a comprehensive and coordinated deployment campaign (pre-retrofit) and awards and recognition for buildings that have retrofitted through *L.L.E!* (post-retrofit). Both the initial deployment campaign and post retrofit awards will have public support from the Mayor of Milwaukee will be coordinated by business improvement districts throughout the City, and other partners that represent building constituencies.

D5.1 Documentation of Deployment Strategy (BP3, Q1)

D5.2 100+ buildings impacted by DOE (BP3, Q4)

D5.3 Documentation of Awards for buildings that have most aggressively implemented energy efficiency solutions (BP3, Q4)

D5.4 Case study of overall effectiveness of LLE (BP3, Q4)

**Subtask 5.1: Deployment Campaign:** Promote *L.L.E!* through events, direct calls to building owners, and website

M5.1 Deployment Campaign Launched (BP3, Q1).

**Subtask 5.2: Awards**

M5.2 Award event scheduled (BP3, Q2)

M5.3 Award event held (BP3, Q4)

**Budget Period 3 Go/No-Go Decision Point (BP3 Q2):** *L.L.E!* has 100 buildings in its project pipeline.

**D. PROJECT MANAGEMENT AND REPORTING**

The City of Milwaukee Office of Environmental Sustainability will be the project’s prime recipient, administrator, and project manager. The City will manage tasks from other partners via vendor or informal partner relationships. OES will provide oversight and contractually manage project risk through the more in-depth timelines and milestones represented in the PMP.

Reports and other deliverables will be provided in accordance with the Federal Assistance Reporting Checklist following the instructions included therein.

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