



# Beyond Benchmarking 301: Improvement Pathway

City of San José Energy and Water Building Performance Ordinance (BPO)  
February 2023




*Environmental Services*



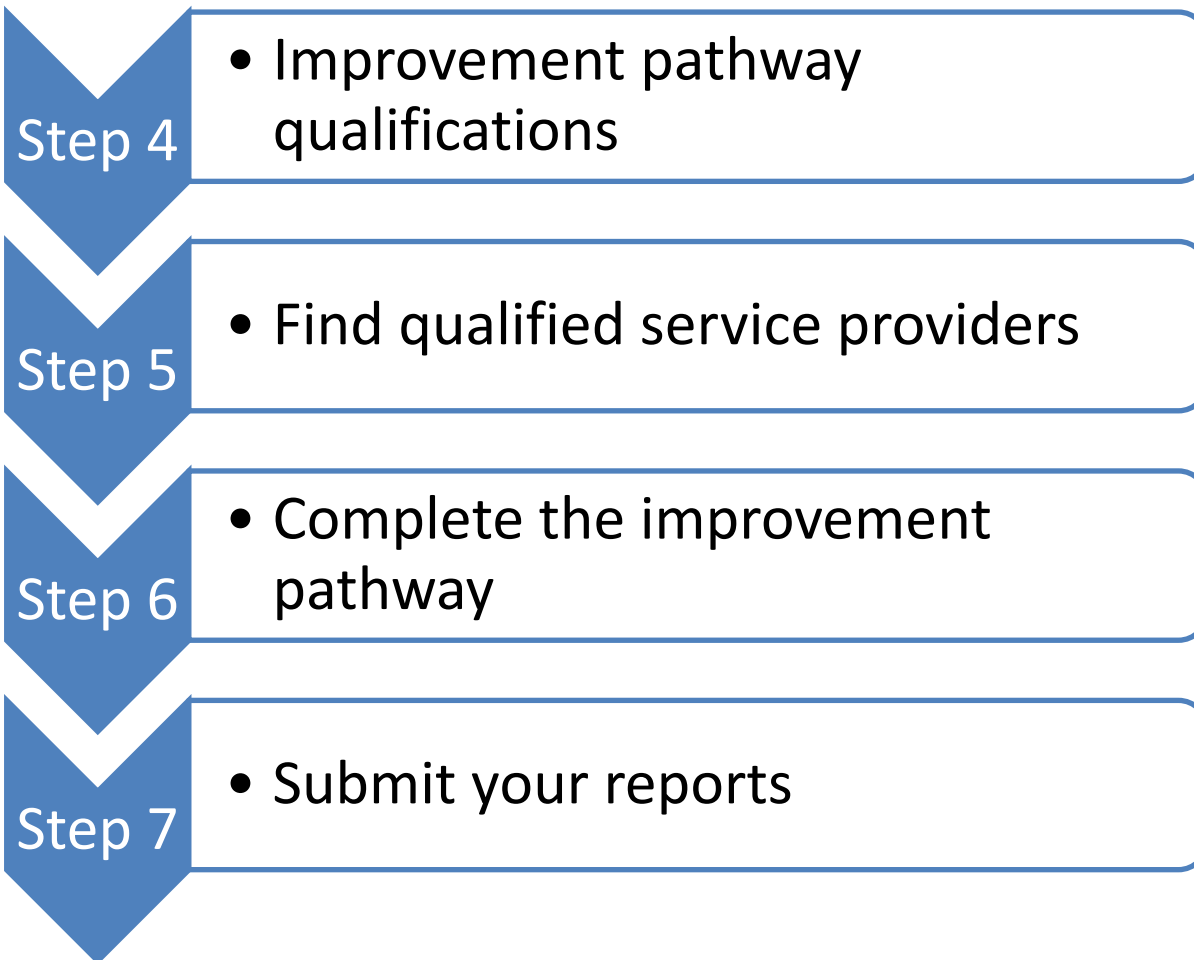
Delivering world-class utility services and programs  
to improve our health, environment, and economy.

# Before You Begin Your Improvement Pathway (Steps 1-3 of the Compliance Guide)

STEP 1	STEP 2	STEP 3	<b>GO!</b> ...you are ready to get started on the Improvement Pathway! 
Determine your building's Beyond Benchmarking compliance deadline.	Determine whether your building qualifies for a Beyond Benchmarking exemption.	Verify you have submitted benchmarking data for the previous three years.	



# Improvement Pathway: Steps To Being Compliant (Steps 4-7 of the Compliance Guide)





# Qualifying for the Improvement Pathway

- Applicable to a property that is:
  - 1) unable to meet energy or water efficiency standards **OR**
  - 2) does not have 3 years of compliant benchmarking data.
- Action options for Improvement Pathway:
  - Audit
  - Retrocommissioning (Rcx)
  - Two Efficiency Improvement Measures
- Actions must be performed and signed off by licensed professionals and submitted by the owners.







# Finding Qualified Service Providers

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- A service provider for the purposes of the Ordinance is a person that is qualified to:
  - Complete a given Beyond Benchmarking action
  - Verify that the project and any associated follow up actions were completed
  - Submit the Improvement Pathway form, with project report included






## Options for Selecting a Qualified Service Provider

- Choose a Qualified Service Provider on San José's list: [Beyond Benchmarking Webpage](#).
- Environmental Protection Agency's [ENERGY STAR List of Licensed Professionals](#).
- Hire a professional that you found yourself.\*
  - Must meet the qualifying conditions.





## Completing Your Pathway: Audit, Retrocommissioning, or Efficiency Improvement Measures...

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- **Project Completion:** Minimum of one action for each unmet standard.
- **Project Timeline:** No earlier than five years before the building's beyond benchmarking deadline.
- **Record Keeping:** Maintain records of improvement actions for a minimum of five years.
- **Reporting:** After completion, submit form\* and report to the City.
  - Form must be signed by the service provider



# Completing the Improvement Pathway: Energy and Water **Audits**



**Audit:** analysis of a building's energy and/or water efficiency, including the measures that a building owner can take to improve its efficiency.



**Energy** audits must meet or exceed the following:

- Level two audit standards with respect to ASHRAE.
- Energy assessment or audit by the utility provider of the building where potential savings opportunities are provided.



**Water** audits shall be performed to industry standard practices and include evaluating:

- Potable distribution, irrigation system, reuse opportunities, and water features



An aerial photograph of a city plaza. In the center, there is a circular area with several palm trees. To the right, a building has a large red sign that reads "SANTITAS". The plaza is paved with grey tiles and has some outdoor seating with white umbrellas. A black car is visible on the street to the left.

## Completing Improvement Pathway: Energy and Water **Retrocommissioning**

- **Retrocommissioning (RCx):** Ensures building systems are designed, installed, tested, and capable to operate efficiently.
- **Energy RCx**
  - Minimum: HVAC and indoor lighting systems and controls, water heating systems, and renewable energy systems.
- **Water RCx**
  - Minimum of potable water distribution/landscape irrigation/water reuse systems and water features.





## Completing Improvement Pathway: Energy and Water **Efficiency Improvement Measures**

- **Efficiency Improvement measures (EIMs):** actions implemented to reduce energy or water consumed for a function.
- This action requires that two measures be completed for each unmet standard.
- Owners are required to provide information on Base Building Systems and equipment, a list of all EIMs that can reduce energy or water use, associated cost savings, and the costs of each measure.





# Submitting Your Forms



- Submit the Improvement Pathway Compliance Form to the City.
  - You must attach your Level II Audit report, RCx report, or Energy Efficiency Measure Report, and any other supporting documentation to your submission.
  - The service provider that completed the project must sign the report.
- All submittal forms will be located on the [Beyond Benchmarking webpage](#) and will be made available no later than March 1, 2023.

# Beyond Benchmarking Resources

- Our Beyond Benchmarking webpage is where all the helpful resources live.
  - Compliance Guide, FAQs, Compliance Schedule, submittal forms, Webinar Schedule, etc.
  - <http://www.SJEnvironment.org/Beyond-Benchmarking>
- For questions
  - Email: [benchmarking@sanjoseca.gov](mailto:benchmarking@sanjoseca.gov)
  - <http://www.SJEnvironment.org/Benchmarking>





# Thank you for joining us!

## Any Questions?



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