



# Condominium and Cooperative BEPS Toolkit

Meeting the District of Columbia's Building Energy Performance Standards (BEPS)



Note: This is a Building Innovation Hub resource, developed with input from DCSEU and the District Department of Energy and Environment. It is intended only as a guide and does not guarantee compliance with the District's requirements and laws. It is, ultimately, the responsibility of the board and building owner to comply according to the District's regulations.

## Who Is This For?

Condominium (condo) and cooperative (co-op) owners, managers, and boards/associations located in Washington, DC, who:

- 1 must meet the Building Energy Performance Standard (BEPS) Period 1 (which covers private buildings 50,000 square feet and up, including condo and co-op buildings).
- 2 must meet future BEPS compliance cycles, which cover private buildings 10,000 square feet and up, including condo and co-op buildings.



Look for these circles to determine whether a section applies to you.

### This guide includes the following:



Tips for condo and co-op buildings to meet the BEPS



What to do if something goes wrong and you need more time from the District



How to approach the BEPS in a way that is not overwhelming and keeps everyone in-the-know



Where you can go for help and to get your questions answered regardless of your technical background



How to create a plan for your building



Helpful language to use when hiring a contractor or consultant



Where you can find money to pay for the work needed on your building



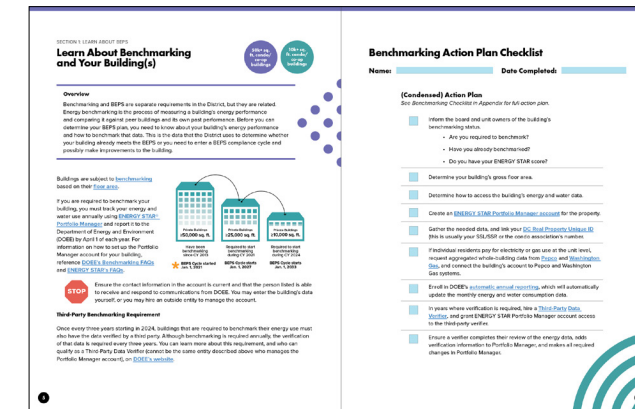
A companion adaptable PowerPoint presentation that explains the BEPS Period 1 Compliance Cycle and process so you can use it to present to your board, property manager, or residents/fellow owners

## How to Use This Guide

This guide provides help for condo and co-op buildings that currently need to meet the District's Building Energy Performance Standards (BEPS) requirements. Condo and co-op buildings under the District's BEPS Period 1 Compliance Cycle are private buildings 50,000 square feet and up. Future BEPS compliance cycles will include condo and co-op buildings greater than 10,000 square feet, so read along if you are preparing for future BEPS compliance and want to start improving the energy efficiency of your building.

The guide is broken out into sections so it is easy for you to navigate to the information you need based on where you are in the process.

### Each section has a two-page layout:



The **left** side has valuable information on the specific topic, including links to find additional information.

The **right** side has an Action Plan checklist that includes a place to enter the name of the person responsible for completing the checklist action and date it was completed.

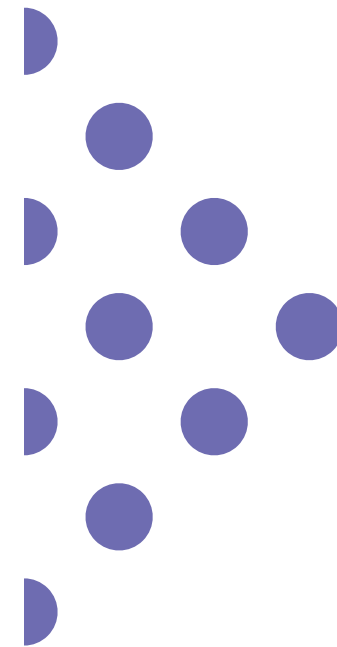


**Presentation slides** that accompany this guide are also available for those who need to present information to condo boards, unit owners, etc.



## Table of Contents

|   |           |
|---|-----------|
| <b>Section 1: Learn About BEPS</b>                  | <b>4</b>  |
| Learn About Benchmarking and Your Building(s)       | 5         |
| Learn About BEPS and Your Building(s)               | 7         |
| Review a Snapshot of the BEPS Cycle 1 Process       | 9         |
| <b>Section 2: Plan for BEPS Compliance</b>          | <b>12</b> |
| Decide Who Will Manage the Process                  | 13        |
| Understand the BEPS Standard You Need to Meet       | 15        |
| Find Funding Opportunities                          | 17        |
| Consider an Energy Audit                            | 19        |
| Communicate with the Board and Residents            | 21        |
| <b>Section 3: Start the BEPS Compliance Process</b> | <b>24</b> |
| Review Energy Audit Results                         | 25        |
| Select a Compliance Pathway                         | 27        |
| Implement Low-Cost Energy Efficiency Measures       | 29        |
| Hire Contractors                                    | 31        |
| Report Your Progress to DOEE                        | 33        |
| Troubleshoot Challenges                             | 35        |
| <b>Appendix</b>                                     | <b>38</b> |
| BEPS Applicability Checklist                        | 39        |
| Benchmarking Checklist                              | 41        |
| BEPS Compliance Pathway Cycle 1 Steps               | 43        |



# Learn About BEPS

- Learn what comes before BEPS: benchmarking and how to do it.
- Learn what BEPS is and whether it applies to your building.
- Review a snapshot of the BEPS Period 1 process.

# Learn About Benchmarking and Your Building(s)

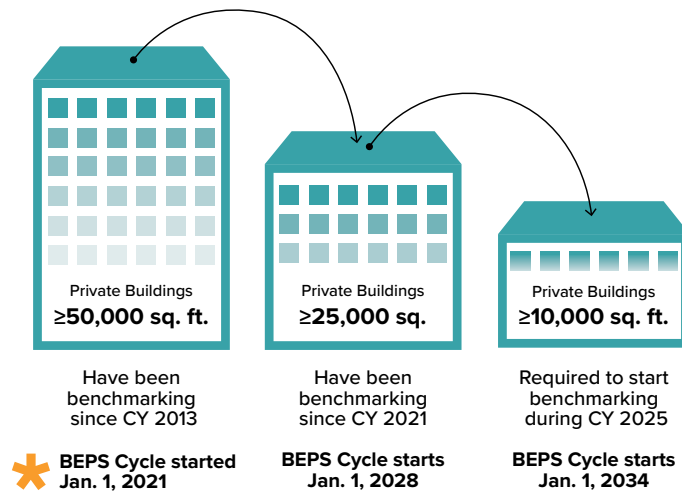


## Overview

Benchmarking and BEPS are separate requirements in the District, but they are related. Energy benchmarking is the process of measuring a building's energy performance and comparing it against peer buildings and its own past performance. Before you can determine your BEPS plan, you need to know about your building's energy performance and how to benchmark that data. This is the data that the District uses to determine whether your building already meets the BEPS or you need to enter a BEPS compliance cycle and possibly make improvements to the building.

Buildings are subject to [benchmarking](#) based on their [floor area](#).

If you are required to benchmark your building, you must track your energy and water use annually using [ENERGY STAR® Portfolio Manager](#) and report it to the Department of Energy and Environment (DOEE) by May 1 of each year. For information on how to set up the Portfolio Manager account for your building, reference [DOEE's Benchmarking FAQs](#) and [ENERGY STAR's FAQs](#).



Ensure the contact information in the account is current and that the person listed is able to receive and respond to communications from DOEE. You may enter the building's data yourself, or you may hire an outside entity to manage the account.

## Third-Party Benchmarking Requirement

Once every six years starting in 2027, buildings that are required to benchmark their energy use must also have the data verified by a third party. Although benchmarking is required annually, the verification of that data is required every six years (Note: The first deadline for third-party verification was in 2024). You can learn more about this requirement, and who can qualify as a Third-Party Data Verifier (cannot be the same entity described above who manages the Portfolio Manager account), on [DOEE's website](#). The Hub has also published [a blog](#) and [downloadable scope of work](#) to help navigate the process.

# Benchmarking Action Plan Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

See *Benchmarking Checklist in Appendix* for full action plan.

Inform the board and unit owners of the building's benchmarking status.

- Are you required to benchmark?
- Have you already benchmarked?
- Do you have your ENERGY STAR score?

Determine your [building's gross floor area](#).

Determine how to access the building's energy and water data.

Create an [ENERGY STAR Portfolio Manager account](#) for the property.

Gather the needed data, and link your [DC Real Property Unique ID](#) (this is usually your SSL/SSR or the condo association's number).

If individual residents pay for electricity or gas use at the unit level, request aggregated whole-building data from [Pepco](#) and [Washington Gas](#), and connect the building's account to Pepco and Washington Gas systems.

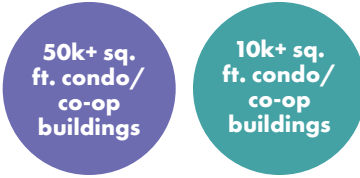
Enroll in DOEE's [automatic annual reporting](#), which will allow DOEE to automatically download property use details and energy and water data from your Portfolio Manager account so you don't have to manually submit your benchmark report each year.

In years where verification is required, hire a [Third-Party Data Verifier](#), and grant ENERGY STAR Portfolio Manager account access to the third-party verifier.

Ensure a verifier completes their review of the energy data and adds verification information to Portfolio Manager. If data needs to be corrected, follow the guidance in [DOEE's FAQs](#).

On an annual basis, review/update property use details and upload calendar year utility data to ensure actual energy and water use information is correct by May 1 reporting deadline.

# Learn About BEPS, and Your Building(s)



## Overview

Today, buildings account for over 70 percent of the greenhouse gas emissions in DC. By reducing emissions, we reduce pollution, improving our air and our health. We can also waste less energy and potentially lower energy bills.

In 2018, the District passed the [CleanEnergy DC Omnibus Act of 2018](#). In Title III of the act, the District created the Building Energy Performance Standards (BEPS) program as a way of meeting the energy and climate goals of the [Sustainable DC plan](#)—to reduce greenhouse gas emissions and energy consumption by 60 percent by 2030. The BEPS program works by setting standards for the energy performance of buildings.

The first BEPS cycle applies to buildings over 50,000 square feet. Cycle 2 will expand to also apply to buildings 25,000 sq. ft. and greater, and Cycle 3 will expand to also apply to buildings 10,000 sq. ft. and greater. See the chart on the next page for the phase timelines.

For any buildings that do not meet the energy performance standards for their size and type, DOEE will provide a set amount of time to comply with the requirements. This is called a “compliance cycle.” At the end of this set of years, the owner(s)/boards for condos and co-ops will show that their buildings’ energy performance has improved, or they will face potential financial penalties. This is where our guide can help you meet the BEPS.

Buildings that meet the standard during the baseline year do not need to take any more action now, but they may not meet the next standard, so they should use this time to do longer-term planning for improving building efficiency.

## Tools and resources



Learn about how buildings affect your health, wealth, and the climate in [this learning series](#).

For more information on how high-performing buildings also positively impact our health, read [Health and Wellness Meet Energy Performance](#).

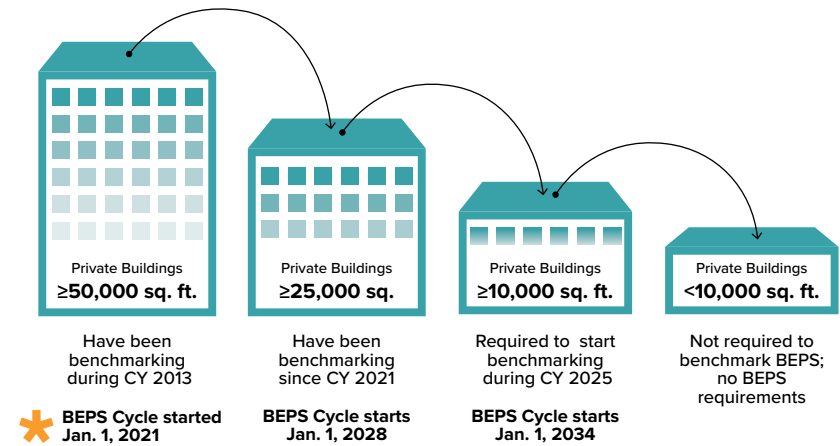
# Does the BEPS Apply Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

## Does BEPS apply to me?

The timeline for BEPS depends on the size of your building. Below is a breakdown of the first three BEPS compliance cycles.

What is the total square footage of your building?



Check which box applies to you.

If your building is larger than 50,000 square feet, confirm your building’s BEPS Period 1 status on the District’s [BEPS disclosure, energy benchmarking map](#) or [the Building Owner Portal](#).

If your building is smaller than 50,000 square feet but larger than 10,000 square feet, then BEPS does not yet apply to you. Nevertheless, you can learn about benchmarking and taking steps towards energy efficiency in the following sections.

If you aren’t sure or need additional help determining your building’s status, contact the DOEE for confirmation via their [Building Performance Helpdesk](#), or reach out to the [Building Innovation Hub](#).

## Review a Snapshot of the BEPS Cycle 1 Process

50k+ sq. ft. condo/co-op buildings

If the BEPS Period 1 applies to your building, you may use the below checklist of relevant steps as a reference to help you meet BEPS requirements.

- 1 Confirm that your building is subject to BEPS and whether or not it meets the standard on the District's [BEPS disclosure](#), [energy benchmarking map](#), or [Building Owner Portal](#).
- 2 If you need help determining whether your building meets the standard for your property type, contact DOEE via their [Helpdesk](#), or reach out to the [Building Innovation Hub](#).
- 3 Inform the board and unit owners of the building's BEPS status and what this means for the building (i.e., if energy usage must improve or retrofits may be necessary, the BEPS timeline and how that overlaps with the capital improvement cycle, etc.).
- 4 Consider creating a BEPS subcommittee internally. Decide who will shepherd the building through the BEPS process, oversee hiring of vendors, and coordinate with DOEE as necessary.
- 5 Choose a BEPS Compliance Pathway (Cycle 1 due date was April 1, 2023). If you aren't sure which BEPS Compliance Pathway to choose, you can ideally use an [ASHRAE Level II Energy Audit](#) to understand which Pathway might be best for your building, based on cost and your unique building's situation (see [this sample scope of work](#)). A Level I Audit may also be helpful, but will not give you the detailed information that might be needed to make a Pathway decision. Otherwise, use the [Hub's BEPS Compliance Pathway Wizard](#) for help choosing one. If you did not choose by the deadline, contact DOEE as soon as possible.
- 6 Follow the [requirements and timeline](#) for that Pathway.
- 7 Understand how the building uses energy and the performance and age of existing building components (HVAC equipment, windows, insulation, lighting, etc). Again, [consider hiring an expert](#) to conduct an energy audit to provide you with energy efficiency measures that can lead your building to a higher level of energy performance.
- 8 Choose energy efficiency measures to implement based on the results of the energy audit. These measures are building-specific and might range from retro-commissioning and retuning to HVAC system replacements.

- 9 Complete and commission all building modifications by December 31, 2025. *While this is not a requirement spelled out in the regulations, we recommend this as the latest date by which measures should be operational in order to maximize the impact of the measures on the performance evaluation in 2026.*
- 10 Benchmark the building's improved energy performance for a full year, starting January 1, 2026, through December 31, 2026.
- 11 Provide the completed benchmarking data in ENERGY STAR Portfolio Manager to DOEE by May 1, 2027, and get this performance year data verified by a third party to demonstrate compliance with your chosen BEPS Compliance Pathway. A Compliance Action Report is also required to demonstrate BEPS compliance. The deadline is currently April 1, 2027.
- 12 DOEE will review and determine whether you have met the requirements and potentially enforce Alternative Compliance payments if necessary.

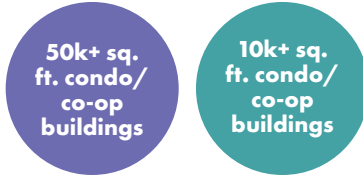




# Plan For BEPS Compliance

- Assign who will oversee the BEPS compliance for your condo or co-op building.
- Understand the BEPS energy performance standard for your building and your building's current score.
- Assess your funding reserves and options for financial support.
- Determine your first steps; hire an energy auditor.
- Learn how to present the information collected so far to your board / oversight committee.

# Decide Who Will Manage This Process



# Establish a BEPS Committee Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

## Overview

It's important to establish roles and responsibilities early in your BEPS process because getting and staying organized will streamline the Compliance Cycle process and lessen confusion.

Decide at the beginning who will be responsible for which parts of the BEPS process, and who will be available to support you in meeting the deadlines. You will also want to figure out how your board and residents will regularly receive updates and how financial decisions will be made.

**We recommend forming a BEPS committee with the following roles and responsibilities:**



**Approver(s)**

Approving body that will review all proposed work, contracts, report results, funding/financing options, etc., and who will ultimately sign off on next steps. This individual or individuals could be a board member, the entire BEPS committee, or a coalition of residents.



**BEPS Project Manager**

Responsible for the day-to-day management of the BEPS process and final BEPS submission. The manager delegates tasks to helpers and reports to the approvers. Often the manager is an individual with technical knowledge of the building. Note that the BEPS project manager will not necessarily be on the board, but it is the board that is ultimately, and legally, responsible for meeting the BEPS or bringing the property into compliance.



**Helpers**

Responsible for assisting the project manager with various BEPS-related tasks, such as creating or updating the ENERGY STAR Portfolio Manager account, collecting utility information, coordinating communications between residents, starting the energy audit process, seeking and contracting vendors, supporting with DOEE communications, understanding the age and condition of the building's existing equipment, and more. Helpers can include residents, other volunteers, other BEPS committee individuals, hired consultants, and others.

Review the suggested BEPS roles and responsibilities, and who is available for support. Consider if your typical decision-making structure might need to change

Gather with board members, residents, and other decision makers to establish a regular check-in process and to formally delegate responsibilities.

Make a commitment to include all residents as part of key decisions, especially when weighing in on financial decisions and impacts.

Regularly present updates to all residents, and make meeting notes and decisions easily available if not all residents attend. If the building has a resident website, consider posting updates and agreed-upon commitments there. If not, establish a communication channel to make it easier for all decision makers and residents to follow the BEPS process and progress. Be sure to have a sign-in sheet or other attendance record.



Ensure your committee and approving body is made up of residents with varying ranges of income levels and backgrounds to ensure an **equitable decision-making process!**



# Understanding the BEPS Standard You Need to Meet

50k+ sq. ft. condo/co-op buildings



### Overview

After reporting your benchmarking data, you will need to check whether your building's energy performance meets the current BEPS energy performance standard for your property type (multifamily).

The BEPS standard for multifamily buildings for BEPS Cycle 1 is an ENERGY STAR score of 66, or a Weather Normalized Source Energy Use Intensity (EUI) of 110.7 kBtu/ft<sup>2</sup> for rare multifamily buildings that do not qualify for an ENERGY STAR score. If your building has an ENERGY STAR score, your compliance is based on this number (66), not the Source EUI.



## Status Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Utilize the [BEPS Disclosure](#), [Energy Benchmarking Map](#), or [Building Owner Portal](#) to find your building's current energy performance. Or for more instructions, use the [guided tour](#) to assist you. This tells you if your building's energy performance meets or does not meet the BEPS.

Note what your building's compliance status is below:

\_\_\_\_\_

Date: \_\_\_\_\_

Log your score information for future reference.

| BEPS 1   | ENERGY STAR Score | Source EUI |
|--|-------------------|------------|
| Multifamily Standard (includes Condo and Co-Ops) | 66                | 110.7      |
| My Building                                      | _____             | _____      |

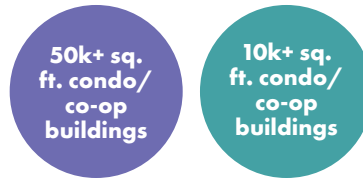
Calculate the amount of energy your building will need to reduce to meet the ENERGY STAR score determined above by setting a target in the ENERGY STAR Portfolio Manager goals section. Utilize [this ENERGY STAR website](#) and search for instructions on how to set a target.

My target change in ENERGY STAR score\*: \_\_\_\_\_

My target change in Weather Normalized Source EUI\*: \_\_\_\_\_

\*Note: the evaluation metric varies by Compliance Pathway and whether or not a building is eligible for an ENERGY STAR score. The referenced targets in this checklist are based on the Standard Target Pathway. Reference the BEPS Guidebook for more information.

# Find Funding Opportunities



## Overview

By now, you should have learned:

- the basics of the BEPS program.
- how to assign who will manage the process.
- your building's ENERGY STAR score relative to the BEPS standard for multifamily.

Paying for building improvements is often the biggest concern for condo and co-op management teams. The BEPS project manager should research available opportunities, linked below, in order to present options to the BEPS committee or other decision makers.

### Administrator



### Building Sector



- COMMERCIAL OFFICE
- HOSPITAL
- HOTEL
- INDUSTRIAL
- INSTITUTIONAL
- MULTIFAMILY AFFORDABLE
- HOUSING
- MULTIFAMILY MARKET RATE
- HOUSING
- RETAIL
- SCHOOL
- UNIVERSITY

### Energy Type



### Financing Incentives



APPLY FILTERS →

RESET

You can use the Hub's [Funding and Financing Map](#), filtering by building sector, to find financial resources that may help pay for these improvements.

Contact the DC Sustainable Energy Utility (DCSEU) to learn how to receive financial support from the DCSEU's [whole building](#) and [individual unit](#) rebate and incentive offerings. Additionally, you may qualify for the [Affordable Housing Retrofit Accelerator](#), which offers enhanced incentives for income-qualified buildings. The [DC Green Bank](#) also offers special financing that may be relevant. There also are many private lending solutions available, including those from local banks, credit unions, CDFIs (find some [here](#) and [here](#)), [Fannie Mae](#)/Freddie Mac, and more. There may be funding available from the Inflation Reduction Act (IRA). Try out the [Incentive Calculator](#) to see what you may qualify for.

After all funding, financing, and incentives are pursued, explore whether an increase to residents' fees or a special assessment is necessary. Ensure BEPS is part of your condo's or co-op's future reserve studies and reserve fund planning.

You can contact [the Hub](#) to find out more about possible financing solutions and to connect with other condo/co-op groups who are willing to share their experiences financing

# Funding Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Use the [funding and financing database](#) to research options for multifamily buildings.

[Contact DCSEU](#) to learn how to receive financial support from DCSEU's [whole building](#) and [individual unit](#) rebate and incentive offers. The DCSEU will also help you understand whether you qualify for enhanced incentives and support through the [Affordable Housing Retrofit Accelerator](#).

Contact the [DC Green Bank](#), visit the [Incentive Calculator](#) website for government incentives, and contact private lenders to discuss incentives, low-cost financing, and creative financing solutions.

Start compiling a list of organizations you've reached out to and where you think funding opportunities may align for your building.

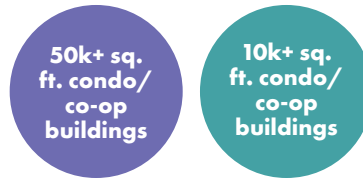
Discuss the retrofit financing process with other condo and co-op BEPS subcommittees or boards to get additional input on potential solutions and strategies.

## Resident input

It is important for residents to be involved in funding and financing discussions. In many cases, resident input is required in condo association bylaws, particularly if the project will require a significant capital investment. We recommend residents be present to vote on:

- options to prevent increases in HOA fees or other fees
- decisions on how improvements will affect resident fees, and what payment options may be needed
- decisions on financing or major financial undertakings being considered to meet the BEPS

## Consider an Energy Audit



### Overview

If you don't have a full understanding of how your building uses energy or what type of energy efficiency measures are needed to meet the BEPS, then we recommend conducting an ASHRAE Level II Energy Audit. The cost for an energy audit is relatively small compared to potential annual savings on your utility bills and the avoided financial penalties for noncompliance at the end of the compliance cycle. Energy auditors will help you understand the best options for your building, including the costs and benefits of building improvements to help meet the BEPS, fuel switching opportunities, and compliance pathways.

If your building is close to meeting the BEPS standard for multifamily, you may be able to reach it through operational improvements or through low- or no-cost improvements. If your building needs greater energy savings to meet the standard, capital improvements may be necessary. An energy audit can give you this information, so you can make an informed choice regarding your BEPS compliance plan.

There are specific rules and procedures that you must follow in order to meet the BEPS. The Hub's [Energy Audit Scope of Work](#) explains what the auditor needs to do and how it pertains to that specific pathway's documentation requirements. If you don't know which pathway is right for you, ask your energy auditor to help identify the best BEPS Compliance Pathway for your building situation.

### To assist you with conducting an energy audit, you can:



Use the [BEPS Compliance Pathway Wizard](#) to understand which BEPS Compliance Pathway is most appropriate for you and your building.

Use the Hub's [Find-A-Vendor](#) notification system, to alert vendors of the project opportunity and to connect you with them to solicit bids.

Check for available DCSEU [energy audit incentives](#) to offset the cost of a qualifying energy audit.\*



Contact the Hub at [info@buildinginnovationhub.org](mailto:info@buildinginnovationhub.org) with questions related to using the Hub's scopes of work or finding a vendor.

\* All DCSEU offerings are subject to availability of funds.

## Energy Audit Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Confirm whether the building has had an energy audit conducted in the past and, if so, what type.

Review the Hub's scopes of work to understand the level of effort and time involved in an audit and what the vendor will need to do.

- Use the [scope of work listed on this page](#) to help you choose a BEPS Compliance Pathway and analyze multiple pathway options.
- Use the [scope of work listed on this page](#) if you have already confirmed that you will be following the Prescriptive Pathway.

Download and modify the Hub's sample scopes of work to use when hiring an energy auditor.

Complete the [Owner Project Submission Form](#) on the Hub's website if you would like to be connected to a pool of service providers for energy audit bids. Ensure that you:

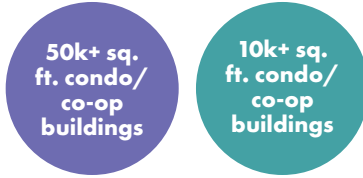
- Check "Multifamily: Market Rate" or "Multifamily: Affordable" (depending on your building) from the Property Type and Use checklist.
- Input "Energy Auditor" as Project or Service Type Needed.
- Check off that the vendor must hold the following certifications: "Certified Energy Auditor (CEA)," "Certified Energy Manager (CEM)," "Building Energy Assessment Professional (BEAP)," "High-Performance Building Design Professional (HPBD)," "Multifamily Building Analyst (MFBA)."
- Upload the scope of work to the application.

Aim for at least three bids for an energy audit.

Review the bids for total cost: check with the DCSEU to see if there are [rebates available](#) to offset the cost of the energy audit. Review the proposal to carry out the scope of work, and make sure the bids cover everything you asked for in the scope. Last, consider calling at least two references / past clients for each bidder.

Present this information to the board or BEPS subcommittee before hiring the energy auditor as outlined in Section 2.

# Communicate with the Board and Residents



## Overview

Frequent and open communication is critical to obtaining approval from the board and other internal decision makers for services, energy efficiency retrofit projects, and funding and financing sources (and associated implications) that will not only help your building meet the BEPS, but future-proof it for long-term performance. Resident input, following equitable decision-making processes and building in ample time for input feedback, is also key to ensuring that the building has an effective plan to increase energy efficiency and meet all legal requirements.

If you get stuck and need another person to chat with about putting this information together, fill out the contact form for the [Building Innovation Hub team](#), and they will talk with you free of charge!

## Resident input

Note that it is important for every household to be aware of this BEPS compliance discussion since this affects every owner. We recommend communication to residents include:

- BEPS and why it applies to your building
- what the building may need to do (energy upgrades, improvements)
- how work to address BEPS may also improve indoor air quality and thermal comfort for residents
- the funding reserves and options for funding available to the building
- decision points where votes will be needed

**Tip:** Make sure your email lists are up-to-date.

## Tools and resources



[Research](#) on how BEPS can improve affordability, resilience, and thermal comfort and indoor air quality

# Communication Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

**BEPS Committee members, board members, and residents will need information on the items below.**

**See the accompanying slides for sample slides to use in meetings.**

An overview of the building's ENERGY STAR Portfolio Manager account and status (see page 41)

An overview of the BEPS requirements and related laws, including benefits and potential risks for the building (see pages 5-10)

An overview of how Benchmarking and BEPS are separate but related requirements and of how the timelines overlap (see pages 41-43)

A description of how the building is currently performing relative to the BEPS, including the ENERGY STAR score and source EUI, and how far off they are from the standard (see pages 15-16)

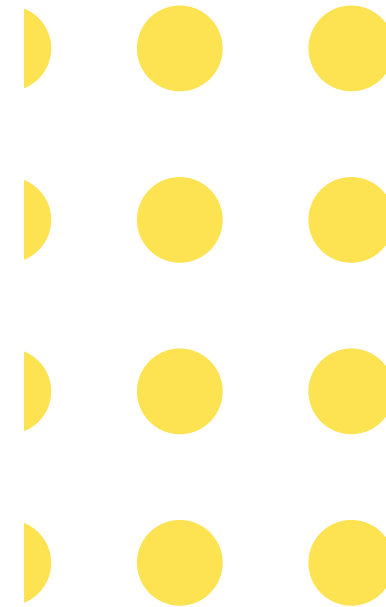
Information on the BEPS timeline and how it relates to the building's capital improvement cycle (see pages 8-9)

A clear picture of the building's current financial reserves, how much it will cost to implement BEPS-related measures (if known) or cost of an energy audit to get these estimates, and the funding/financing options that are available (see pages 17-18)

The internal role assignments and responsibilities for the BEPS work (see pages 14-15)



## Notes



# Start The BEPS Compliance Process

- Review energy audit results.
- Select a compliance pathway.
- Hire contractors.
- Implement low-cost energy efficiency measures.
- Report your progress to DOEE.
- Troubleshoot challenges.

# Review Energy Audit Results

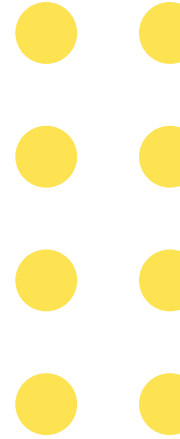


## Overview

By this point, you should have received an energy audit for your building. Make sure you have time to review the audit results, ask questions, and understand the energy efficiency options available to you.

The results of the general audit should include the following:

|  |   |
|--|---|
| <b>Executive summary</b>                             | Research on how BEPS can improve affordability, resilience, and thermal comfort and indoor air quality  |
| <b>Research summary</b>                              | Results of the analysis and a review of your building's current operations and management and how it affects the energy score                                 |
| <b>Compliance Pathway recommendation</b>             | Two packages of measures/updates recommended per potential plan, with the projected change in the ENERGY STAR score   |
| <b>Estimated energy and cost savings</b>             | Review of the auditor's estimates of cost and savings associated with potential building updates, including avoided BEPS compliance penalties for the updates |
| <b>Ancillary (extra) benefits</b>                    | Additional benefits of updates, such as cleaner air and improved thermal comfort  |
| <b>Available incentives (outside funding)</b>        | List of funding sources to use for the recommended energy updates to the building   |
| <b>Estimated energy efficiency measure costs</b>     | Cost of the recommended updates to meet BEPS and the return on investment (ROI) you could expect, based on the money saved on utilities due to lower energy   |
| <b>Certified compliance with ASHRAE Standard 211</b> | In case you choose the Prescriptive Pathway   |
| <b>Supporting documentation</b>                      | Data and evidence of the audit  |



The Hub's [scope of work](#) includes the above for the energy auditor to prepare for you and requires two meetings to discuss the report. If you received an energy audit but didn't get this level of support, consider hiring the vendor to provide additional information or consulting time. Remember that the Prescriptive Pathway audits have very specific requirements, and the audit will not be accepted if it does not meet those requirements.

# Energy Audit Results Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Review the options the energy audit report presents for the building's compliance plan: the return on investment, recommended updates, costs, savings, and incentives available.

Consider the best BEPS compliance pathway to choose for meeting the BEPS, based on the current available funding of the building, available incentives, and estimated costs and savings projected.

Share the options presented in the energy audit with your BEPS subcommittee or approving body to make a final decision on which compliance pathway to select and which energy efficiency measures to start with, based on the Compliance Pathway requirements.

Consider making preparations for funding future energy efficiency measures that will be implemented later by keeping an eye out for new funding opportunities from local DC groups (DCSEU, DC Green Bank, private lenders, etc.) and adding the measures to the condo or co-op association's next reserve study and reserve fund.



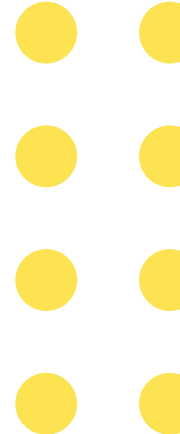
Use the Hub's [companion presentation slides](#) to share your energy audit results with your committee.

# Select a Compliance Pathway



## Overview

Once you have reviewed the results of your energy audit, it's time to select a BEPS Compliance Pathway (Cycle 1 due date was April 1, 2023). Below is an overview of what needs to be submitted to DOEE, and the most common compliance pathways. You can also switch your pathway at a later date with DOEE. You will choose one of the below compliance plans by completing the [Pathway Selection Form](#). Completed forms must be submitted to DOEE.



## Most Common Compliance Pathways

### [Performance Pathway](#)

This plan requires a Site Energy Use Intensity (EUI) reduction of at least 20 percent. The [evaluation metric for most buildings](#) will be Site EUI Adjusted to Current Year. The actions to achieve the 20 percent reduction for condos and co-ops are up to the boards.

### [Standard Target Pathway](#)

For condo and co-op buildings, this plan requires the building to reach an ENERGY STAR score of 66. The actions are up to the boards.

The [Extended Energy Deep Retrofit \(EDER\) Alternative Compliance Pathway \(ACP\)](#) is now available for condo and co-op buildings. This type of ACP is designed for buildings that may wish to implement deeper retrofits to target higher energy savings that exceed the energy performance requirements over several Cycle. This pathway also provides more flexibility and time to plan for deeper building upgrades that may be needed for condos/cooperatives. Specific performance goals and reporting requirement are outlined in section 4.2.2 of the [BEPS Guidebook](#).

## Visit the Building Innovation Hub for the following resources:



For more information on compliance pathways and timelines, see the Hub's [BEPS Compliance Pathway Timelines page](#).

Use the [BEPS Compliance Pathway Wizard](#) as a starting point to help you understand which BEPS Compliance Pathway is most appropriate for you and your building.



Contact the Hub at [info@buildinginnovationhub.org](mailto:info@buildinginnovationhub.org) with questions related to the compliance pathways.

# Compliance Pathway Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Consider your compliance pathway based on your finances, energy audit, and vendor recommendations.

Ensure you have discussed the options with your board, BEPS subcommittee, and residents.

Consider the metrics, evaluation, and reporting that is required by each compliance pathway.

Check the metrics, evaluation, and reporting requirements:

1. Visit the [BEPS Guidebook website](#) online.
2. Scroll down to find the chapter with the pathway you're considering.
3. Click on the blue chapter title that has your compliance plan.
4. On the compliance plan page, click on "Metrics and Evaluation" and "Reporting Requirements" in blue.

Once you click, information on metrics and evaluation and instructions for how to report your progress to DOEE will appear. For buildings considering Alternative Compliance Pathways click on the ACP option for relevant evaluation metrics and reporting requirements.

Assign a person to submit the compliance plan after your building owners have made the decision.

Do this by submitting a [Pathway Selection Form](#) to DOEE. (If you need assistance in submitting your plan, you may ask either the vendor who completed your energy audit or DOEE for assistance.)

Inform your vendor (if applicable) and your residents of the progress.

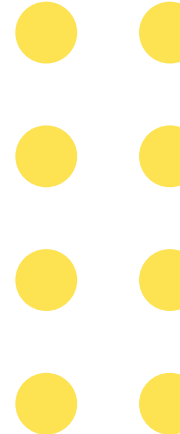
Assign a member of your BEPS committee to be responsible for updating DOEE on progress according to your pathway's reporting requirements.

# Implement Low-Cost Energy Efficiency Measures



## Overview

Depending on how far away you are from the standard, **you may need larger or whole-building substantive upgrades**, such as building envelope retrofits and/or HVAC modifications, to drastically improve the energy performance of the building. The activities suggested below can be used to motivate residents to become involved in energy savings activities in the building. Note that individual unit upgrades or behavioral changes alone are often not enough to meet the BEPS.



Consider including fun and engaging ways to communicate energy savings practices in group meetings, chats, or email chains. This [ENERGY STAR checklist](#) has ideas for both resident upgrades and communication techniques. Some of those include:

- Create door hangers, sticky note reminders, posters, or light switch covers to help occupants or employees remember to take action.
- Hold an energy fair, conduct an energy awareness event in the lobby, or offer building tours to give occupants a sneak peek at the inner workings of the building.
- Give incentives and recognition. Consider starting small with something like a pizza party, ice cream social, or other food rewards for hitting goals or making progress.
- Depending on savings levels, you may also consider awarding cash or prizes for great energy-saving ideas or to energy champions in the building.

Simple measures to start with are on the action plan to the right.

## Additional resources



[ENERGY STAR tips](#)

[Downloadable checklist from ENERGY STAR](#)

[DOE energy-saving tips](#)

# Low-Cost Energy Measures Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Replace lights in units with LED or ENERGY STAR–certified lights.

Utilize room shades to let in the sun’s warmth or keep in the cool, depending on the temperature outside.

Connect major electronic devices to power strips.

Turn off power strips’ power once you’re finished using electronics or devices plugged in. Electronics still use energy if plugged in.

Use task lamps instead of overhead ceiling lighting when possible.

Check to make sure vents are unobstructed.

Check windows for air leaks, and apply caulk or weather stripping to window panes.

Ensure HVAC units get regular maintenance: annual air filter replacements and cleaning, HVAC checkups.

Adjust HVAC schedules and temperature set points so that they are related to when you are actually home. Smart thermostats, available at hardware stores, can assist residents in saving energy when they are not home.

Purchase ENERGY STAR–certified appliances when previous appliances or air conditioners break.

Create a pizza party or fun event to discuss energy savings measures and reward owners on progress.

Create handouts and posters for the building with energy-saving measures residents can adopt easily.



# Hire Contractors



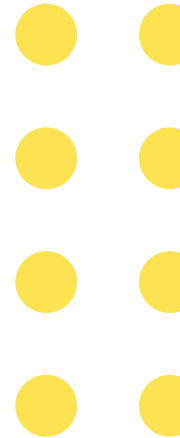
## Overview

Below are a few things to consider as you look through your options for vendors.

The energy audit you completed will have a recommendation for energy reductions. Use this as a starting point to write a [scope of work \(SOW\)](#) for potential contractors. After you have the SOW, you can either reach out to your networks of contractors who usually maintain your building or create a [request for proposals \(RFP\)](#) for qualified vendors to bid on your project. Utilize the Hub's [High-Road Contracting Toolkit](#) to learn about ways to improve the diversity and inclusion of your bidding practices, since many small, minority-owned, and women-owned vendors are historically not included in bidding opportunities.

Qualified vendors can be found by submitting a RFP in the [Find-A-Vendor](#) portal. The portal allows building owners to post their RFPs and lets qualified vendors familiar with energy audits and BEPS to bid on projects. If you choose to look elsewhere for vendors, make sure they are familiar with the BEPS.

This part of the BEPS process **could take years**. The work involved includes agreeing on the SOW, actually completing the retrofits, and verifying the performance, all of which takes much planning and time. This is where you will concentrate the bulk of your work to improve your building's energy performance. It's important to have clear specifications, contract documents, and historical records that outline the necessary energy efficiency improvements and help ensure you meet BEPS.



# Hiring for Upgrades Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Review the energy reductions recommended in your ASHRAE Level II Energy Audit.

Write scopes of work (SOWs). Consider "unbundling" the SOW into smaller bid opportunities to increase the likelihood of bidder/supplier diversity.

If your usual maintenance staff network is not capable of completing the required retrofit work or is unfamiliar with BEPS, write an RFP to find a qualified vendor. Require bidders to undertake "good faith efforts" (GFEs) to recruit small, minority-owned, women-owned, or historically disadvantaged firms onto their teams.

Compare vendors by getting at least three bids on your project.

Confirm the vendor has knowledge of BEPS and has the appropriate certifications.

Conduct a walk-through of the building with the vendor and your maintenance staff before beginning the work.

Get regular communication updates from the vendor, and communicate with residents about any changes that will occur in units. This includes regular check-ins as the work is being performed, to monitor progress of the retrofit work.

Communicate updates as required to DOEE, and contact them if you encounter any setbacks that might affect whether you complete the work on time.

As the work approaches completion, hire a commissioning agent to commission the retrofits to ensure performance. All retrofit work should be completed, commissioned, and operational by December 31, 2025. This is important for getting the maximum energy savings impact, since compliance with the BEPS for Cycle 1 is evaluated based on benchmarking data for the full calendar year 2026, beginning January 1, 2026.

**STOP** Note: If the work done ends up worsening air quality, thermal comfort, and safety, the building can be liable for extra penalties.

**Reminder:** Start planning for future building upgrades during these years, since future compliance cycles could mean more retrofit work. Long-term planning can prevent double work.

**Tip:** When selecting a vendor, ask for references from past projects, and check the vendors' credentials with the Department of Licensing and Consumer Protection (DLCP) to ensure you are hiring a qualified vendor.



## Extra links



Use [this toolkit](#) to learn how your building can advance diversity and inclusion when hiring vendors.

# Report Your Progress to DOEE

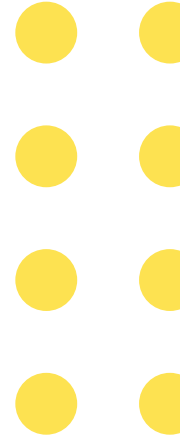


## Overview

BEPS reporting requirements are based on the pathway selected. However, keeping DOEE updated on your progress is recommended, as they can help troubleshoot issues if you encounter difficulties or setbacks.

If you have chosen the performance or standard pathway and have implemented measures, your pathway likely does not have additional interim reporting requirements until the end of the Compliance Cycle. However, if anything changes in the middle of the cycle, it's important to maintain communication with DOEE.

If you are pursuing an Alternative Compliance Pathway (ACP), your process is unique to your building, and it must be approved by DOEE. Follow the specific requirements laid out in the ACP approval.



# Reporting Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

## Action Plan

Update DOEE on progress and submit documentation periodically according to your compliance pathway's requirements around reporting.

By December 31, 2025, have a commissioning agent commission the retrofits to ensure performance.

Beginning January 1, 2026, record 2026's calendar year of benchmarking data.

Get benchmarking data verified by a third-party verifier. [Third-party verification](#) of benchmarking data is required for the final/evaluation year, which is 2026's data, due May 1, 2027.

Submit your [final documentation](#) (varies by compliance plan) to demonstrate BEPS compliance according to your compliance plan. Buildings on the Standard Target Pathway and Performance Pathway are required to submit a Completed Actions Report by April 1, 2027.



The compliance deadline is December 31, 2026, for BEPS Period 1. Following this deadline, Completed Actions Report is due April 1, 2027, and third-party-verified benchmarking data is due on May 1, 2027. After you submit your documentation for BEPS compliance, DOEE will confirm you've met the performance requirements for your pathway or determine whether there are any financial penalties if you have not met the pathway requirements.



Stay tuned for more information, including potential penalties, by subscribing to the [Hub](#) and DOEE newsletters.

You can find the specific reporting requirements for your compliance pathway by visiting the [DOEE BEAM portal](#).

# Troubleshoot Challenges

To get official building answers, contact DOEE's [helpdesk](#). The information gives an overview of potential options.

50k+ sq. ft. condo/ co-op buildings

### How to change your building's Pathway

At any time during the Compliance Cycle, a building owner may apply to DOEE to change the Pathway (including for buildings under a DOEE-assigned pathway) by submitting a [Pathway Change Application](#). DOEE will evaluate the application and notify the building owner of the change approval, request more information, or report that the request is denied. For more specifics, [visit this website](#) and see Section 2.6 Pathway Change Application.

### How to request an extension

If a building owner needs additional time to meet an interim reporting or verification deadline for administrative reasons, the owner may request an extension in advance of the deadline through [DOEE's Building Owner Portal](#).

### How to request a delay of compliance

If a situation occurs that could cause a building to fail to meet energy performance requirements at the end of the BEPS Cycle, the building owner should request a *delay of compliance*, not an extension. To request a delay, building owners should [reach out to DOEE](#) in advance of the deadline. For more information on requirements for delays and extensions, visit [Chapter 5 on this website](#). A building on any pathway may request a delay of up to three years. Affordable housing buildings are allowed to request a delay longer than three years; [contact DOEE](#) to discuss your situation. Note that a delay of compliance for BEPS Cycle 1 does not delay the start of BEPS Cycle 2.

### What to do if you're fined

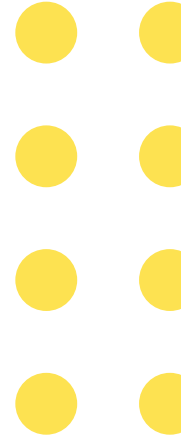
If you don't understand why you were fined or believe that a Benchmarking or BEPS fine is incorrect, [reach out to DOEE](#), complete the "Submit a General Inquiry" ticket, and include the notice of the fine. DOEE will reach out and work with you on next steps.

50k+ sq. ft. condo/ co-op buildings

10k+ sq. ft. condo/ co-op buildings

### What to do if you run out of funding/ have contractor bad experience

Notify DOEE; they may grant an extension or help you find incentives and additional funding. The Hub is also available to help you search for qualified vendors and funding sources. Additionally, let the Hub know about the bad experience so that the Find-A-Vendor portal can be improved.



# Reporting Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

## Action Plan

Identify the problem you're facing.

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Call together members of your team to discuss the problem and potential solutions.

[Contact the Hub](#) to talk with an expert who knows the BEPS policy and can talk through any problems you're experiencing for no cost. The Hub staff can help you come to a solution and may point you to resources you didn't know were available.

[Contact DOEE](#) if the problem is substantial and can't be solved through other means.

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Update the board or approving body and residents if the problem encountered may affect BEPS compliance by the deadline.

Describe the problem, people consulted, action steps you took, and what the options moving forward will be.



## Notes



# Appendix

- **BEPS Applicability Checklist.**
- **Benchmarking Checklist.**
- **BEPS Compliance Pathway  
Cycle 1 Steps.**

# BEPS Applicability Checklist

## What if my building doesn't meet the standard?

Buildings that do not meet the standard for their property type will be required to improve their performance over the course of a compliance cycle and demonstrate their accomplishments at the end. If your building is performing better than the standard for your property type, you are not required to take action under BEPS.

Noncompliant buildings must improve performance during the cycle and demonstrate it through benchmarking at the end. It's important to note that even if they meet or are above the standard for the first Compliance Cycle, it's critical to maintain or incrementally improve performance during that time because the standards will all become more stringent over time.

If a building fails to meet the BEPS compliance requirements at the end of a cycle, it could face financial penalties.

## Helpful Links

[Hub explanation of the BEPS standards and rules](#)

[Hub explanation of the BEPS Guidebook](#)

[BEPS one pager](#)

[BEPS disclosure](#)

[DOEE's BEPS FAQs](#)

[Hub's FAQs about BEPS](#)

[BEPS timeline](#)

[Energy benchmarking map](#)

[Building Owner Portal](#)



Have questions? You can contact the Building Innovation Hub for guidance at [info@buildinginnovationhub.org](mailto:info@buildinginnovationhub.org).

# BEPS Applicability Checklist

Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Determine which BEPS compliance requirements apply to your building.

Does BEPS Cycle 1 [apply to me?](#)

**Yes**, my building is greater than 50,000 square feet or includes garden style complexes with several buildings each smaller than 50k that may still be covered since we share meters.

**Not yet**, my building is smaller than 50,000 square feet. My building may be affected by future BEPS cycles if it is larger than 10,000 square feet.

**No**, my building is less than 10,000 square feet. My building is not affected by BEPS.

If BEPS Cycle 1 does apply, does the building meet the BEPS?

**If it does**, no action is required for this BEPS Period. However, the building may need to take action during future BEPS Periods. Even if you meet the BEPS this period, or this period does not apply to you, the building is still subject to the benchmarking and Third-Party Data Verification requirements.

If my building doesn't meet the BEPS, what do I need to do and when?

You were required to choose a Compliance Pathway by April 1, 2023. If you did not, contact DOEE as soon as possible.

Once a Pathway is chosen, follow the [requirements and timeline](#) for that Pathway.



Complete and commission all building modifications by December 31, 2025. While this is not a requirement of the regulations, this is the latest date by which measures need to be operational. This is because you must benchmark the building's improved energy performance for a full year, starting January 1, 2026, through December 31, 2026.

Provide completed benchmarking in ENERGY STAR Portfolio Manager and relevant reporting requirements to DOEE to demonstrate compliance with your chosen compliance pathway.

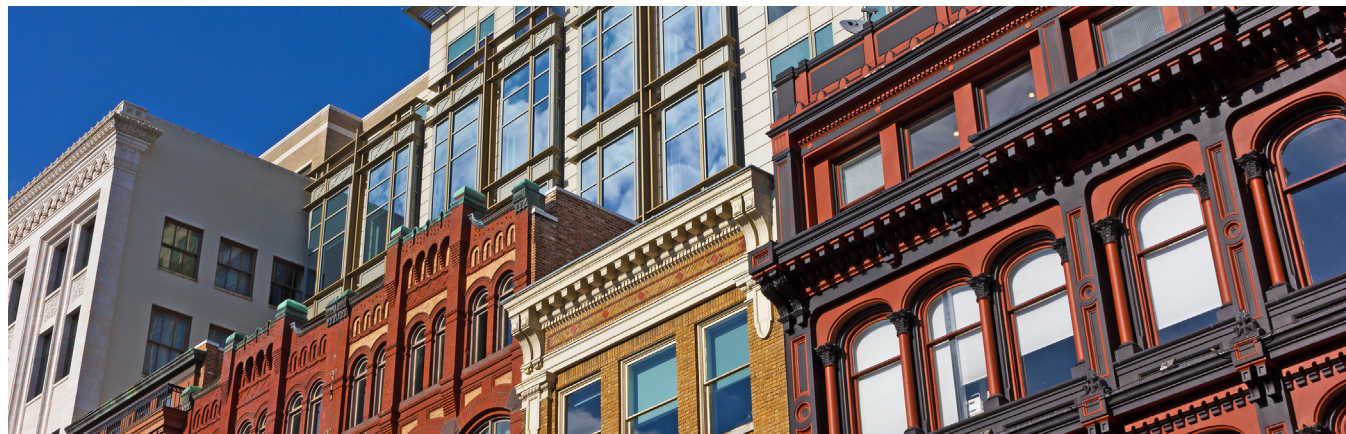
DOEE will review and determine whether you have met the requirements, and it may enforce financial penalties if necessary.

# Benchmarking Checklist

## Overview

Determine your building's gross floor area. Is it 10,000 sq. ft. or greater? Is your property listed on the District's [Covered Building List](#)? If yes to both questions, follow the steps below. Note: If you are over 10,000 sq. ft. but not on the Covered Building List, [contact DOEE](#) to confirm, since you may still be required to benchmark and eventually comply with BEPS in a future cycle. Remember that complexes of smaller buildings that share metering and are together larger than 10,000 sq. ft. must benchmark.

1. Inform the board and unit owners of the building's benchmarking status.
2. Determine whether you can easily access the building's energy and water data, or what you need to do to gather that.
3. Create an [ENERGY STAR Portfolio Manager account](#) for the property.
4. Gather and add the needed data to the account: meters, floor area, number of units, common areas, fuels sources, operating hours, etc. Ensure this information is accurate and confirmed by as-built drawings and equipment schedules.
5. Find and link your DC real property unique ID; for condos and co-ops, find your number in [DOEE's Covered Building List](#).
6. If individual residents pay for electricity or gas use at the unit level, request aggregated whole-building data from [Pepco](#) and [Washington Gas](#), and connect the building's account to Pepco and Washington Gas systems.
7. Enroll in [DOEE's automatic annual reporting](#).
8. Manually or automatically update the energy and water consumption data monthly for the full calendar year (12 months), January through December. Ensure that property use details, and actual energy and water use information are updated and accurate ahead of the reporting deadline on May 1.



Third-party verification of benchmarking data is required once every six years starting in 2027. The first deadline for third-party verification was in 2024. If you are benchmarking data from 2023, 2026, etc., follow these steps.

1. Hire a [Third-Party Data Verifier](#). You can use the Hub's [sample scope of work](#) to understand the work that an accredited verifier will perform.
2. Confirm that all information is complete in the Portfolio Manager account, and grant account access to the third-party verifier.
3. Have the verifier complete their review of the energy data, gross floor area, and other property information and alert the property owner if any corrections need to be made.
4. Property owner or owner's representative: make all required changes in Portfolio Manager prior to May 1. That data is what DOEE will review to confirm that you are in compliance with the benchmarking regulation.
5. In Portfolio Manager, complete the "Add Verification Information" in the Details tab by May 1. This is what DOEE will review to confirm that you are in compliance with the Third-Party Data Verification requirements. Keep on file a signed copy of the data verification checklist and all supporting documentation of the report.

The Hub's guide to [understanding your energy data](#)

The Hub's [benchmarking overview](#); this also has the Hub's illustration of when buildings are required to start benchmarking

The Hub's resource on [identifying common benchmarking errors](#) and how to fix them



Determining if you are [subject to benchmarking](#) by consulting the District's Covered Building List

DOEE's [benchmarking support resources](#)

DOEE's [benchmarking FAQs](#)

[When buildings become subject to annual benchmarking](#)-DOEE's table (Note: Annual benchmarking is required, but Third-Party Verification is only every six years starting in 2027.)

Third-Party Verifier [requirements and FAQs](#)

# BEPS Compliance Pathway Cycle 1 Steps

## Performance Pathway

1. Reference the Hub's [Performance Pathway timeline](#).
2. Determine the property's site energy use intensity (site EUI) at the beginning of the Compliance Cycle, using the average of calendar year 2018's and calendar year 2019's site EUIs (the baseline years).
3. Choose energy efficiency measures to implement.
4. Implement the energy efficiency measures.
5. By December 31, 2025, commission the energy efficiency measures.
6. Benchmark your property starting January 1, 2026, through December 31, 2026, to determine the property's improved Site EUI at the end of the compliance cycle, measured through the evaluation years. This must show a 20 percent reduction from the beginning of the Compliance Cycle to the end of the Compliance Cycle.
7. By April 1, 2027, submit the Completed Actions Report to DOEE and by May 1, 2027, submit the third-party verified benchmarking report.

Note: The performance metric for buildings eligible to receive an ENERGY STAR score is [Site EUI Adjusted to Current Year](#). This applies to most multifamily buildings. For the few multifamily buildings that are not eligible for an ENERGY STAR score, the performance metric is Weather Normalized Site EUI.

## Standard Target Pathway

1. Reference the Hub's [Standard Target Pathway timeline](#).
2. Confirm your property's 2019 ENERGY STAR score. If your building is not eligible to receive an ENERGY STAR score, then confirm the property's Weather Normalized Source EUI.
3. Choose energy efficiency measures to implement.
4. Implement the energy efficiency measures.
5. By December 31, 2025, commission the energy efficiency measures.
6. Benchmark your property starting January 1, 2026, through December 31, 2026, to determine the property's improved ENERGY STAR score or Normalized Source EUI (see above for eligibility). The data must show that the property's ENERGY STAR score is 66 or higher or the Normalized Source EUI is 110.7 or lower (see above for eligibility).
7. By April 1, 2027, submit the Completed Actions Report to DOEE, and by May 1, 2027, submit the third-party verified benchmarking report.

## Prescriptive Pathway

The Prescriptive Pathway will be replaced by a new "trajectory pathway" in the next BEPS Cycle. More information will be released by DOEE.

1. Reference the Hub's [Prescriptive Pathway timeline](#).
2. Phase 1: Complete a Level II Energy Audit according to the BEPS requirements, and submit it to DOEE by April 1, 2023.
3. Phase 2: Choose energy efficiency measures to implement.
4. Phase 2: Develop a BEPS Action Plan, Operations and Maintenance (O&M) Program, and Final Energy Efficiency Measures Package, and submit them to DOEE by April 1, 2024.
5. Phase 3: Implement the energy efficiency measures.
6. Phase 3: Create an Implementation Report. Submit them to DOEE by April 1, 2026.
7. Phase 4: By April 1, 2027, submit an Evaluation, Monitoring, and Verification report to DOEE.

## Alternative Compliance Pathways (ACPs)

There are some preapproved ACPs that are most applicable to condos and co-ops, but there is also the opportunity to propose an ACP to the DOEE for approval. Read the [Hub's Guidebook plain speak](#), and reference Chapter 4 of the [BEPS Guidebook](#) for details. Some preapproved ACPs include:

- **Accelerated Savings Recognition.** ASR is for buildings that have achieved deep energy retrofits in this first cycle of BEPS, that wish to have certainty around long-term compliance. The building must demonstrate that it maintained at least 75 percent of its performance.
- **Extended Deep Energy Retrofits (EDER).** EDER is for affordable housing buildings or buildings demonstrating financial distress due to COVID-19 that wish to implement deeper retrofits and higher energy savings, exceeding BEPS requirements over several cycles. DOEE has also [extended the EDER option](#) to condos and co-ops as this pathway also provides more flexibility and time to plan for deeper building upgrades that may be needed.

## ACP Determination Steps

1. Read the BEPS Guidebook and decide whether one of the above preapproved ACPs applies to your building.
2. Reference the Hub's [Alternative Compliance Pathway timelines](#).
3. Propose the chosen ACP to DOEE, and work with them on approval.
4. Continue to work closely with DOEE on your approved pathway requirements and timeline. These will vary building by building.



[www.buildinginnovationhub.org](http://www.buildinginnovationhub.org)