

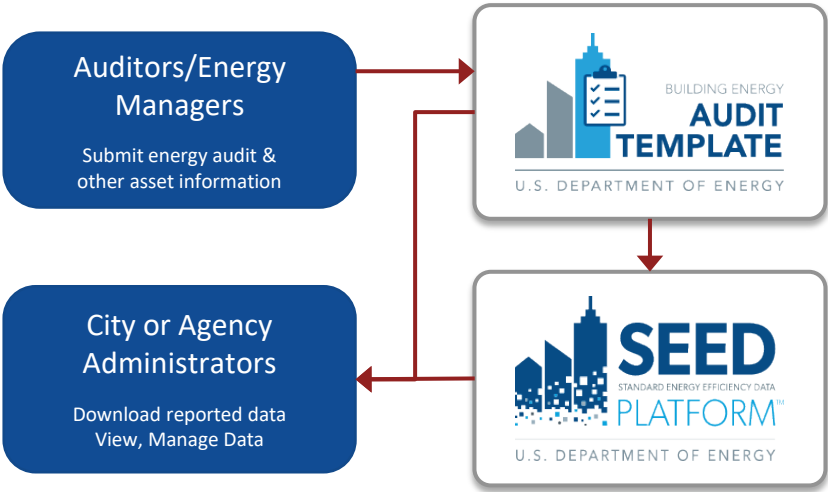
# Audit Template: A Tool for Streamlining Compliance in Building Performance Standards (BPS)

As BPS are adopted by an increasing number of jurisdictions across the U.S., building energy audits will become more widely used as part of BPS compliance.

Standardizing and streamlining the audit documentation process can help BPS program managers achieve consistency in compliance and aid individual building managers to document and implement building efficiency improvements more effectively.

The U.S. Department of Energy’s (DOE’s) Audit Template allows standardized energy audit data collection, reporting, and management of multiple compliance cycles and can play a key role in managing BPS compliance over time.

Audit Template is an easy-to-use, web-based tool developed by DOE for collecting and validating energy audit data that can be customized to each jurisdiction’s needs.



## Example BPS compliance process

### When Buildings Don't Meet Targets: Alternative Compliance Paths

The primary compliance path typically involves meeting specific performance targets, but BPS policies frequently include alternate compliance pathways for buildings unable to meet the prescribed targets.

One common version of an alternate compliance pathway requires the building owner to complete an energy audit, then identify and implement a set of energy measures that will enable the building to either meet the performance target, achieve electrification goals, or reduce energy or emissions by a specific percentage. Other alternative compliance pathways require the implementation of a prescribed set of efficiency measures, or of all the cost-effective measures identified in an audit.

Buildings subject to prescriptive requirements or pursuing an alternate path that involves an energy audit will typically be required to submit documentation that demonstrates they have taken the necessary steps for compliance. Since BPS have multiple compliance cycles, this documentation may need to be resubmitted periodically. This is where Audit Template comes in.

### How can Audit Template be Used for BPS Compliance?

Commercial building energy audits will become more prevalent as BPS go into effect. However, a concerted effort needs to be made to streamline the process for audit data collection. The most commonly used process for audit data collection involves the use of spreadsheets or descriptive templates which result in data that can contain inaccuracies and inconsistencies. Because of the variability in spreadsheet-based data collection tools, it can be difficult to store audit information in a standard machine-readable database that can be used long-term. For buildings pursuing a BPS compliance path that involves an energy audit, the data collection and reporting process can be streamlined by using the Audit Template tool. Audit Template is an easy-to-use, web-based tool developed by DOE for collecting and validating energy audit data that can be customized to each jurisdiction’s needs.

Audit Template’s interface includes five key sections for reporting data: (1) audit details and contact information of key personnel; (2) facility description; (3) utility data and benchmarking; (4) energy consumption by end use; and (5) energy savings opportunities. All energy consumption and energy savings numbers are translated into CO<sub>2</sub>

equivalent (CO<sub>2</sub>e) emissions using emissions factors that can be customized by the jurisdiction. An auditor can use Audit Template's interface to directly enter information about building systems (i.e., heating systems, lighting, etc.) and energy measures, then generate a report to share with building management and the jurisdiction, as needed.

When using Audit Template as a tool in BPS compliance, program administrators can access building submissions in a "City Dashboard" through which they can manage and accept submissions and download the reported data in multiple formats.

Alternatively, Audit Template can share data with DOE's Standard Energy Efficiency Data (SEED) Platform, which can be used by a jurisdiction as a central database for all building energy performance data. This platform can merge information from Portfolio Manager, Audit Template, and other city datasets to allow a jurisdiction to track progress toward jurisdiction-wide energy or carbon reduction goals.

## Reporting Data over Multiple Cycles

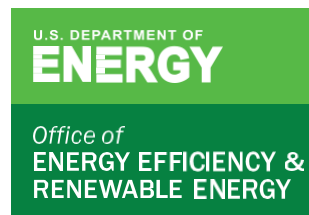
BPS define performance targets which in many cases become stricter over time, driving continuous, long-term improvement in the building stock. Covered buildings have to demonstrate compliance periodically either by meeting the performance target or undergoing assessment through the alternate compliance pathway. When

used as a compliance tool for BPS, Audit Template can support periodic compliance requirements by storing previously submitted data and making it easier for building owners and auditors to quickly update building information. This capability also allows a city to track performance improvements over time and verify implementation of measures identified in previous compliance cycles.

## Getting Support with Audit Template

Jurisdictions interested in using [Audit Template](#) for BPS compliance or other reporting should contact the Audit Template through the help desk [here](#). DOE can provide Audit Template demos and create customized templates to fit a jurisdiction's needs.

For additional information on BPS, or to submit a technical assistance request, visit [energycodes.gov/BPS](https://energycodes.gov/BPS) ■



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### Example: Washington State

Washington State uses Audit Template for BPS compliance. If a building does not meet its performance target, it can instead pursue alternative compliance by performing an energy audit and implementing all cost-effective measures.

Individual building auditors or energy managers use Audit Template to enter building information and efficiency measures, generate a report to share with stakeholders, and submit documentation to Washington State. State officials use Audit Template to track compliance and can also aggregate reported data to track building efficiency potential, needed investments, and progress toward energy targets.

If Washington State changes its performance targets in future compliance cycles, buildings that have submitted an audit through Audit Template will be able to avoid repeated collection of facility data, allowing a significantly streamlined audit process.