

Roles and Responsibilities of VA Energy Managers in 2023

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Presented to James A Haley Veterans' Hospital on behalf of the National Renewable Energy Laboratory (DOE)

May 18, 2023



**THE DURHAM SCHOOL
OF ARCHITECTURAL ENGINEERING AND CONSTRUCTION**

Overview

- Typical Energy Manager Scope of Work (Non-VA and VA)
- Energy Manager Guiding Documents
- Energy Manager Recurring Responsibilities
- Energy Manager Development
- Wrap-up

Energy Manager Scope of Work

Private Sector and VA Positions

Roles and Responsibilities

Energy Manager Responsibilities:

Non-VA, Non-
Executive/Director
(from job listings)

Evaluate existing systems

Monitor building energy
trends

Prepare forecasts of energy
use and cost trends

Quantify Energy
Conservation Opportunities
(energy audits, monitoring)

Project Management for
ECMs

Special projects/systems
implementations

Additional/Ad-hoc reporting
as directed/requested

Communicate with internal
and external stakeholders
on projects and forecasts

Development/Management
of a team; develop best
practices for O&M

Energy Manager Responsibilities:

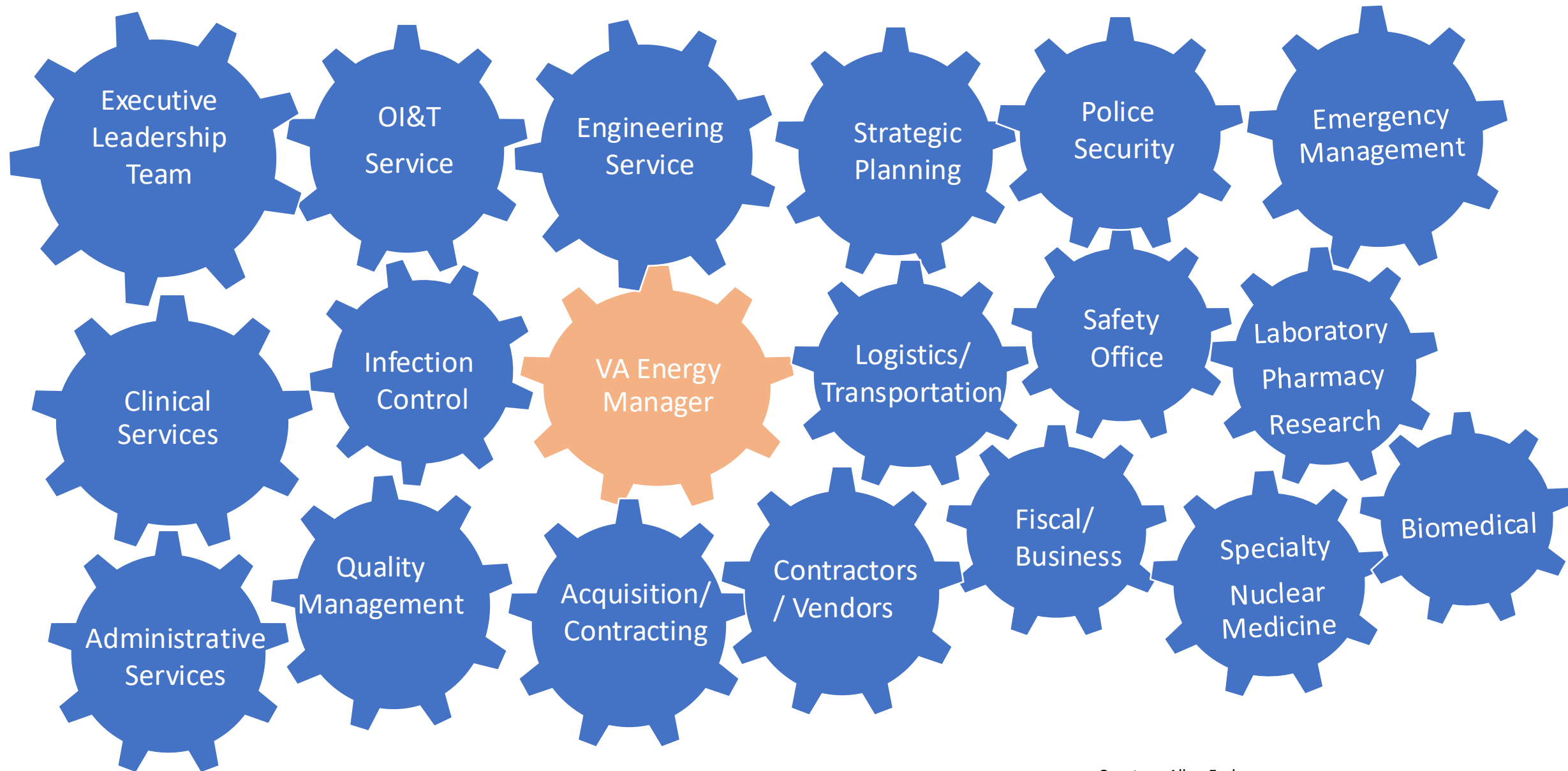
Per job post descriptions at VA.gov

Typical Job roles

- Work with other EMs to work toward VISN/VHA energy goals
- Use energy measurement tools and software
- Plan/Execute commissioning and retro-commissioning projects
- Provide technical support to VISN Capital Asset Manager, NCA, VBA, Joint DOD/VA sites
- Conduct Audits using standard energy analysis tools and software. Provide reports to Center Leadership, VISN, VACO
 - See Appendix/Spreadsheet for additional Information

Varying responsibilities depending on location.

- Some facilities have personnel at different General Schedule Grades
- >1 building/facility per Energy Manager?
- May be responsible for owned and leased spaces, which have different requirements
- May overlap with Facilities Manager or Energy Engineer
- Manages Healthcare Design and Construction Administration
- Infrastructure Planning
- Work with regulatory Agencies (TJC)
- Network Security for BAS and engineering databases



Energy Management – HCS level

Courtesy-Allan Federman
From: Best Practices for Leadership and Organizational Design
Better Buildings Summit, 2018, Cleveland Ohio

Energy Manager FTEs

General Government

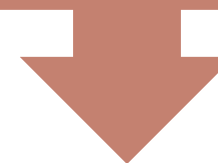
VA-Specific

Energy Manager FTEs: Governmental Facilities

DOE acknowledges that scope varies by location, use type, etc.



EISA requires energy manager responsible for area that constitutes 75% of energy use by agency, but does not define FTE



Some agencies/departments have standards, others do not



Energy Manager FTEs: Healthcare Facilities (Non-VA)

79% had dedicated staff
(practicegreenhealth.org,
2020)

No clear rule that is
universally applied across
all healthcare
organizations.

Organizational Structure,
roles and responsibilities
vary between
organizations

Any Facility-1.5 man-years
for ISO-50001 compliant
Energy Management
System

Energy
Manager FTEs:

Full-time Energy Manager for all
VHA Facilities

Healthcare
Facilities (VA
Specific)

FTE scope varies

No current standard, but
recommendations for staffing
standard

Energy Manager Guidance

Prescribed by Documentation

Directed by VISN, VHA, or other Agencies

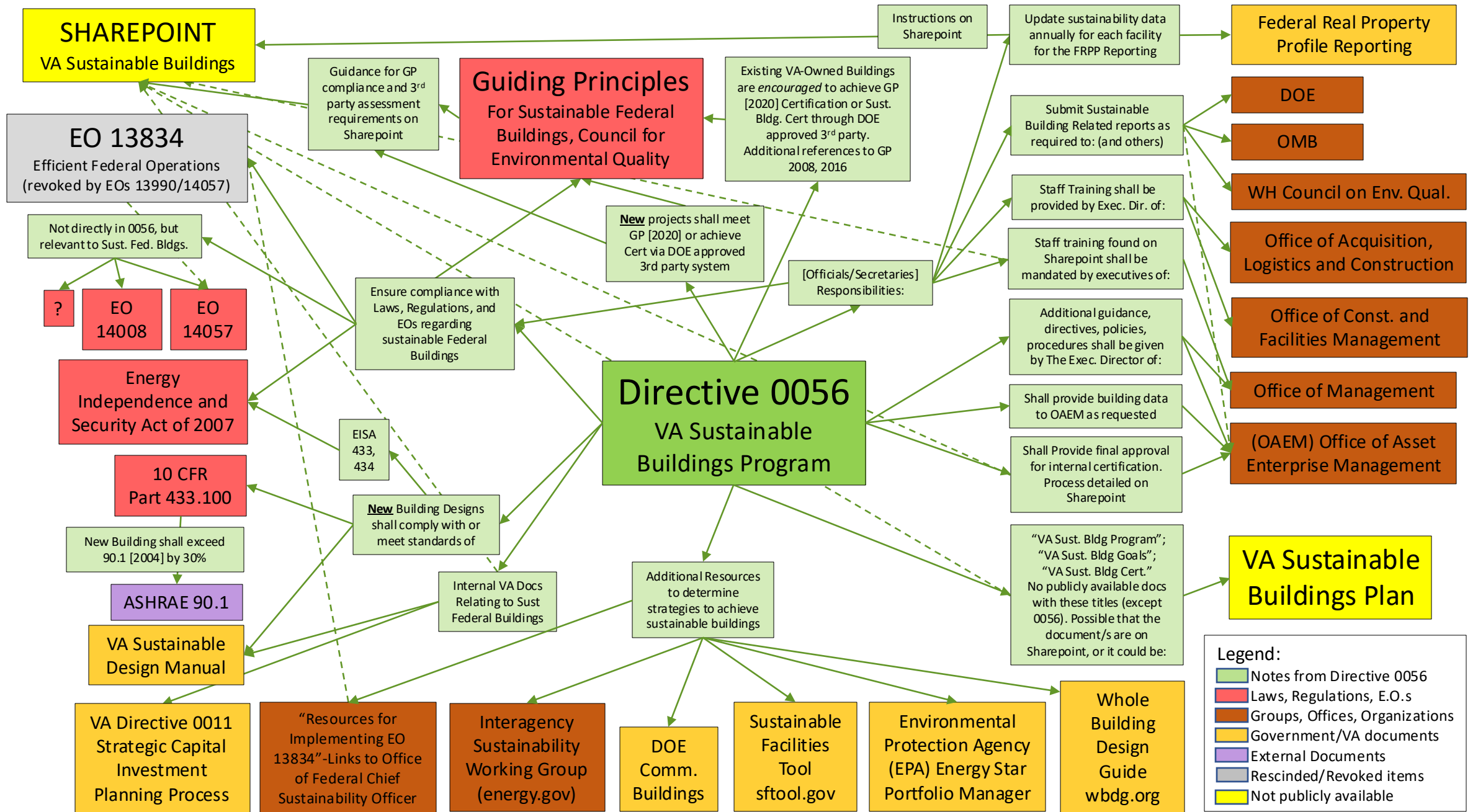
Where to Start?

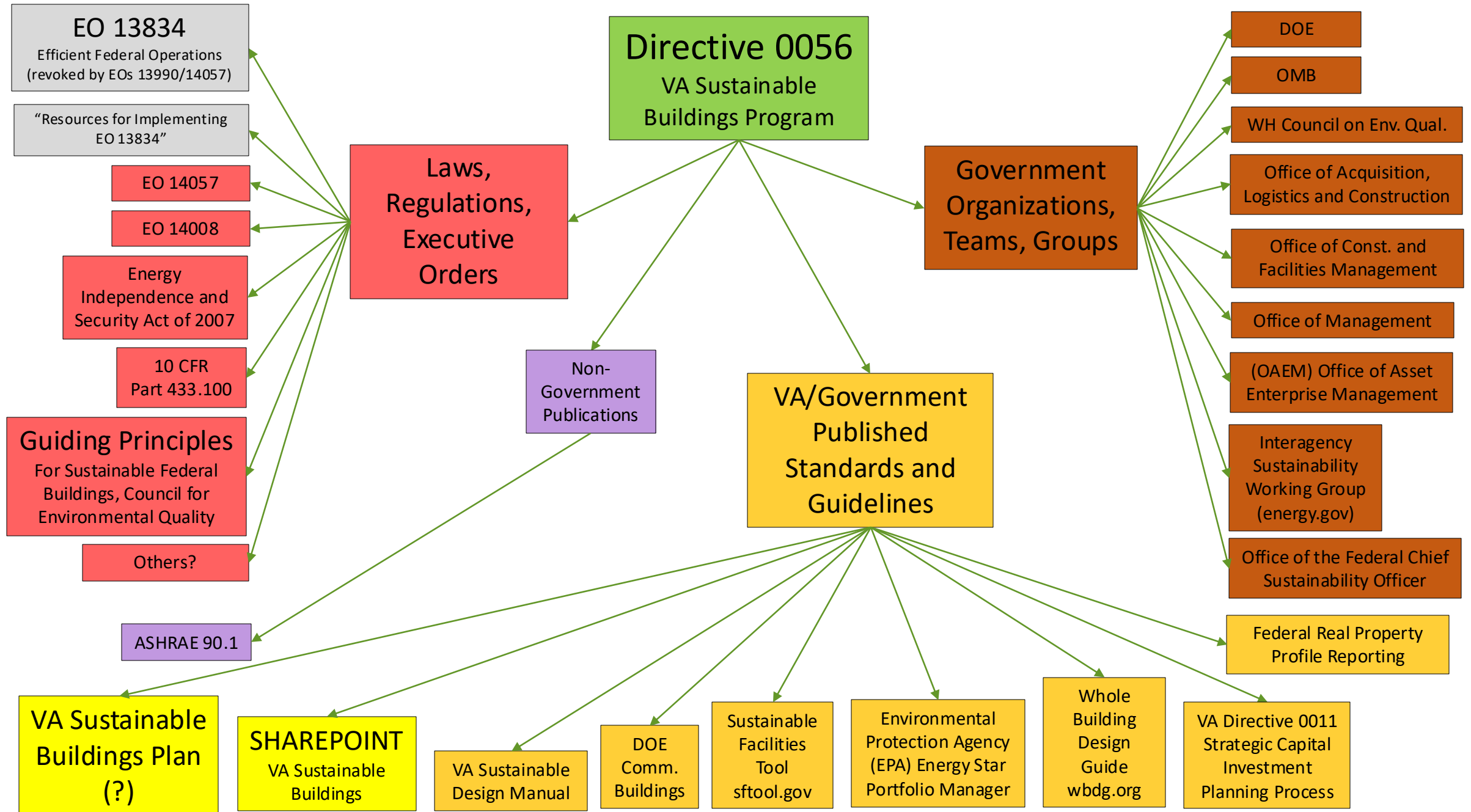
Directive 0056-VA Sustainable Buildings Program

Most recent version from 2021

The screenshot shows the VA Publications website. The header includes the VA logo, the U.S. Department of Veterans Affairs name, and navigation links for Search, Contact us, and Sign in. Below the header, there are tabs for VA Benefits and Health Care, About VA, and Find a VA Location. The main content area is titled 'VA Publications' and 'VA Directives'. On the left, there is a sidebar with a dropdown menu 'I AM A...' and a list of links: VA Publications Home, Statutory Delegations of Authority, Active VA Delegations of Authority, Inactive VA Delegations of Authority, Active VA Designations of Authority, Inactive VA Designations of Authority, VA Directives, VA Handbooks, Active VA Notices, Inactive VA Notices, VHA Publications, and VBA Publications. The main content area displays a table of VA Directives with columns for Document Number, Title, PDF Format, Issue Date, and Total Recs. The table lists 10 directives, with the most recent one being Directive 0009, 'Ensuring Quality of Information Disseminated By VA', issued on 06/03/2019.

Document Number	Title	PDF Format	Issue Date	Total Recs
0000	Delegations Of Authority	PDF	11/14/2018	Dire 000 09/K
0001	Plain Language Program	PDF	07/22/2014	
0002	Authorization of Signature of the Secretary of Veterans Affairs and Deputy Secretary of Veterans Affairs	PDF	01/28/2009	
0003	Technical Specifications and Design Standards for VA Learning	PDF	04/26/2012	
0004	Education and Learning Delivery System	PDF	04/20/2012	
0006	Talent Management System (TMS) E-Learning Section 508	PDF	09/18/2012	
0007	Interagency Coordination of Complex Care, Benefits and Services	PDF	12/24/2014	
0008	Developing Public-Private Partnerships with, and Accepting Gifts to VA from, Non-Governmental Organizations	PDF	05/29/2015	
0009	Ensuring Quality of Information Disseminated By VA	PDF	06/03/2019	Dire 000 636 Har





Publications that Include Facility Requirements that (may) Fall to Energy Managers

Priority Publications

- Several recommendations, specific to Energy Manager roles and responsibilities

- VA Directive 0055
- VA Directive 0056
- Energy Policy Act of 2005
- EISA 2007
- Energy Act of 2020
- Energy Act of 2020 VHA Interim Guidance
- Guiding Principles
- Sustainable Facilities Tool
- ISO 50001 & Ready Playbook

See Also

-Referenced by Priority Publications or recommendations are tangential to Energy Manager

- ASHRAE 90.1
- EO 13834 (revoked)
- EO 14057
- 10 CFR Part 433
- VA Sustainable Design Manual
- Other TIL Design Documents
- Whole Building Design Guide
- VA Sustainable Buildings Sharepoint
- VA Energy, Environment, and Fleet Program

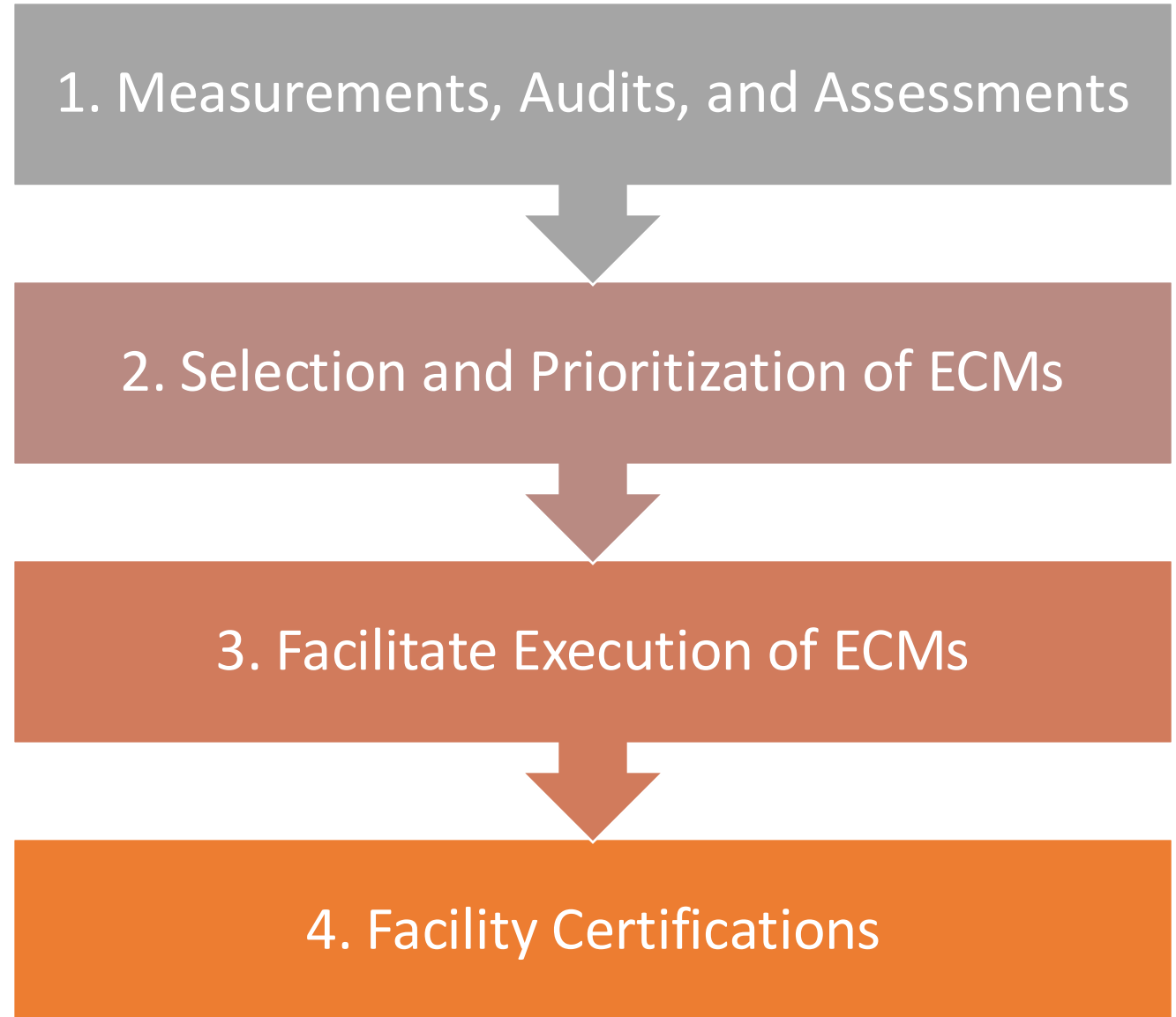
See Appendix A for links/summaries

Energy Manager Responsibilities

Starting point for driving energy efficiency

Categories of Energy Manager Responsibilities

Rough grouping of tasks found in Directing Documents



Step 1: Audits and Assessments - Local/Site



ISO 50001 Ready
Playbook



Guiding Principles
Compliance



Benchmarking of existing
energy consumption
(timelines vary)



Energy Management
Plan to SCIP (Directive.
055)

Step 1: Audits and Assessments - Admin Level

Energy Audits to DOE EISA 432 Compliance Tracking System (CTS) (Dir. 0055)

Energy Conservation Measures (ECM) to CTS (Dir. 0055)

Energy and Water Consumption to VSSC database (Dir. 0055)

Energy, Water and Sewer Costs to FMS (Dir. 0055)

Facility Information entered into Energy Star Portfolio Manager (Dir. 0055)

Facility Energy and Water Audits (OAEM schedule /template) for Sharepoint and CTS

Step 2: Select and Prioritize ECM's



Administration, VISN,
Local targets



Payback requirements
of Handbook 135



Approval/submittal to
SCIP



Requirements of EO
14057



Requirements of
Sustainable Design
Manual

Step 2a: Potential Additional Requirements

Building Audit or
Retro-
commissioning
report

LCCA

Maintenance,
repairs, upgrades,
or performance
contracting

Additional Training
necessary to
complete

SCIP submittal for
Energy/Water
investments

GMP Feasibility
Study

Water Sense
Labeled Products

Energy-Star
Products or DOE-
Designated Energy
efficient products

Step 3: Execute ECMs

- Will vary by facility
 - Execution must take into account disruption of care
 - May require planning to execute during seasonal shut-downs
-
- Preventative Maintenance
 - Repairs
 - Device/Component Upgrades
 - See Appendix B

Step 4: Certification

Internal
Federal/VA
certification

DOE-Approved
3rd Party
Certification

Re-Certification
of Existing
Facilities

Guiding
Principles
Compliance

3rd Party DOE
Compliance for
VA Facilities

Step 4: Guiding Principles (GP) Certification

- Directive 0056 *encourages* Existing Buildings to achieve either:
 - Standards of Guiding Principles
 - Sustainable Building certification via DOE approved 3rd party
- Internal Certification can be achieved via procedures on the VA Sustainable Buildings Sharepoint Site (Sharepoint).
 - Current GP is 2020, however if buildings were certified using 2008 GP AND meet the 6th GP from 2016, they are grandfathered through 2025.
- Interpretation
 - Work toward self-certification to meet GP 2020 if not yet internally certified or grandfathered.
 - If self-certified, work toward external certification via 3rd party process
 - Guiding Principles also includes a checklist for re-certification. This should be pursued if certification is already met.

Energy Manager Capabilities

Continuing Education, Training, and Supplemental Documentation

Workforce Development-Steps 1 and 4

Audits, Assessments, and Certification-Tasks for FTE estimates



Monthly Energy/Water
Reporting



ISO 50001 Ready Playbook



Building Energy Benchmarking,
EUI Calculations, and
miscellaneous reports



Guiding Principles Certification or
Re-certification

Workforce Development-Steps 1 and 4

Audits, Assessments, and Certification- Training

VA-Internal

- Sharepoint training
- Training mandated by Executives/Secretaries

ASHE

- Video Series
- Certified Healthcare Constructor
- Energy University

Sustainable Buildings Tool

- FBPTA Compliance and Skills Gap Checker
- Core competencies List and recommended trainings
- Lists of various External Trainings

Workforce Development-Step 2

Select and Prioritize ECMs-Training

ASHRAE-Effective Energy Management in new and existing buildings

ASHE ECM Video Series

ASHE Certified Healthcare Constructor

ASHE Finance and Budgeting for Facility Managers

ASHE Energy University (Energy Manager/Healthcare Facility Manager)

Whole Building Design Guide

Workforce
Development-Step 2

Select and Prioritize
ECMs-Tasks for FTE
estimation

ISO 50001 Ready
Playbook

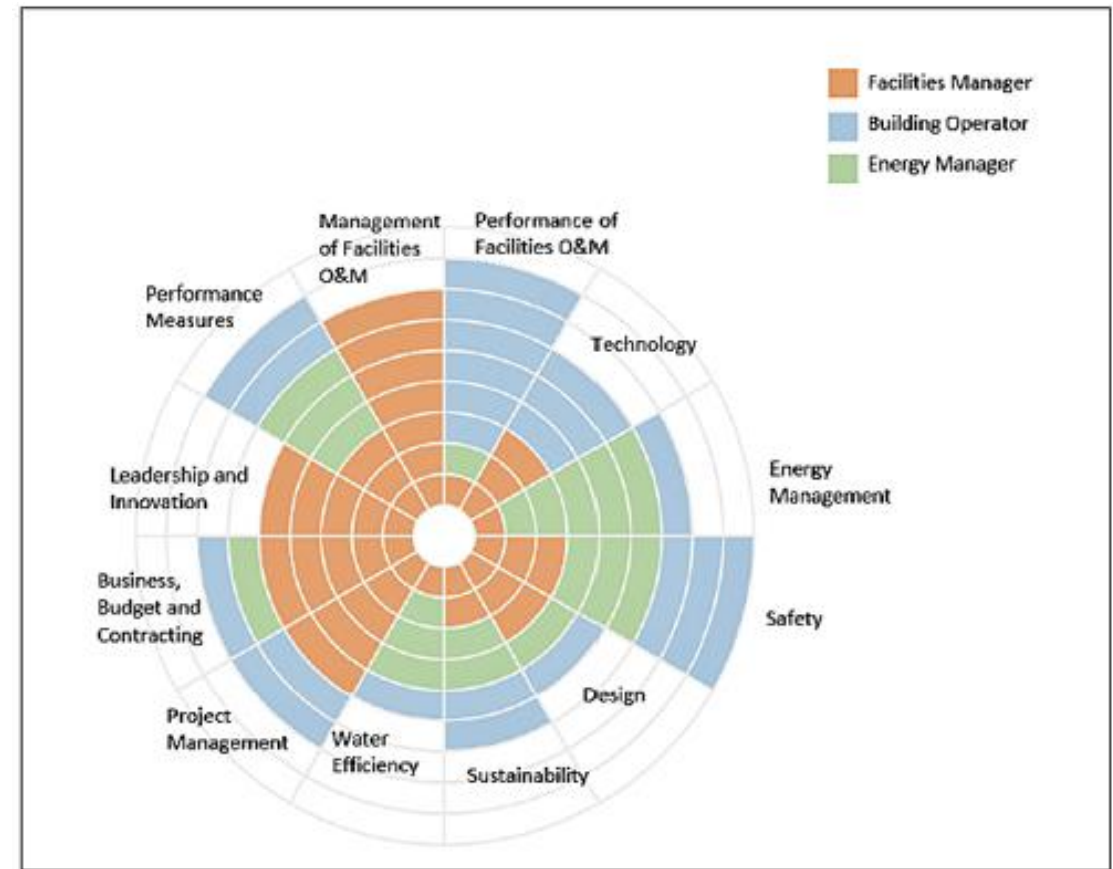
SCIP Assessment

LCCA per Guidebook 135

Workforce Development-Step 3

Training to Execute ECMs-Will Vary by Facility

- ASHE Energy University (Technician)
- ASHE Energy to care (ECMs)
- Federal Building Personnel Training Act Compliance
- Whole Building Design Guide Continuing Education
- Whole Building Design Guide Workforce Development



Source: Whole Building Design Guide Core Competencies

Summary

Energy Manager Scope of Responsibilities

- Measurements/audits
- Prioritization
- Facilitation
- Compliance

Energy Manager Guidance

- Start with Directive 0056, Sharepoint, sftool.gov, Guiding Principles

Energy Manager Training

- ASHE Facilities
- ASHRAE
- CEM

Thank you!

Acknowledgements

We are grateful for the expertise, insights, and generous sharing of their time:

Allison Moe, Project Manager at National Renewable Energy Laboratory

Justin Ahern, Project Manager at Department of Veterans Affairs

Allan Federman, General Engineer at Department of Veterans Affairs

Rick McKittrick, Energy Engineer at Department of Veterans Affairs

Appendix A

Document Summaries

As relevant to Energy Managers

Directive 0055

VA Energy and Water Management Program, Dec 2014

Requires-

- Energy/water consumption data to VSSC database monthly
- Energy, water, sewer cost to VA FMS
- Energy Audit and ECM/WCM data uploaded to DOE EISA section 432 compliance tracking system (CTS)
- Facility info updated/validated quarterly in Energy Star Portfolio Manager
- EISA 432-compliant energy/water audit every 4 years (per OAEM schedule)
- Annual energy management plan at each facility, submitted through SCIP process
- Rules on utility procurement
- For energy/water investments, SCIP process. For GMP funding, CHP and renewable energy projects need feasibility study through GMP, and LCCA
- Water-sense labeled or other water conserving fixtures
- Energy Star certified equipment for 95% of all new contracting actions.
- Additional requirements for construction/renovation

Encourages

- Alternative Financing for energy/water projects (energy savings performance contracts, utility contracts, etc)

References:

- Directive 0011, Strategic Capital Investment Planning Process
- Directive 0056
- EPA-2005
- EISA-2007
- EO 13423, EO 13514

Dir. 0056: VA Sustainable Buildings Program.

Requires Compliance with All or Part of:

- Laws, Regulations, and Executive Orders
 - EO 13834 (*revoked by EO 14057*)
 - EO 14008
 - EO 14057
 - Energy Independence and Security Act of 2007 (EISA)
 - Code of Federal Regulations; 10 CFR,
 - Part 433.100
 - Part 436 (From sustainable Buildings tool)
 - Others not listed
- Direction from Organizations
 - Interagency Sustainability Workgroup (energy.gov)
 - Department of Energy
 - Office of Management and Budget
 - White House Council on Environmental Quality
 - Office of Acquisition, Logistics, and Control
 - Office of Construction and Facilities Management
 - Office of Management
 - Office of Asset Enterprise Management
 - Office of the Federal Chief Sustainability Officer
- VA/Government Documents, Certifications, Testing, Tools, or Compliance Guidelines
 - VA Sustainable Design Manual
 - VA Sustainable Buildings Plan
 - VA Directive 0011: Strategic Capital Investment Planning Process
 - DOE's Commercial Buildings Guidance
 - Sustainable Facilities Tool (sftool.gov)
 - Environmental Protection Agency (EPA) Energy Star Portfolio Manager
 - Whole Building Design Guide (wbdg.org)
 - Federal Real Property Profile Reporting
 - VA Sustainable Buildings Sharepoint Site
 - *Not publicly accessible, additional information needed
- Non-VA/Government guidelines referenced in 0056
 - ASHRAE 90.1

Energy Policy Act of 2005

- 550 pages
- Title 1, Subtitle A- relates to federal programs for government buildings on energy efficiency, reporting,
- Subtitle C-Energy Efficient Products
- Title II-Renewable Energy
- Title VII-Vehicles and motor fuels
- Title IX-Electricity
- Title XI-Hydropower and Geothermal Energy
- Title XII-Climate Change Technology

Energy Independence and Security Act (EISA-2007)

From the EPA.gov summary Page:

- move the United States toward greater energy independence and security;
- increase the efficiency of products, buildings, and vehicles;
- improve the energy performance of the Federal Government; and

EISA 432 Compliance Tracking System

Hub for reporting on, tools to help report development of:

- Designation and location of facilities covered by EISA requirements
- Assignment of energy managers
- Energy and water evaluations completed at covered facilities
- Implementation of energy and water efficiency measures, including estimated cost and savings
- Follow-up status on implemented measures, including measured savings and persistence of savings
- Building benchmarking information.

Energy Act of 2020

Federal Funding for Programs and Guidelines for

- Energy Efficiency in buildings
- Nuclear energy
- Renewable energy and storage
- Carbon managemeng
- Carbon removal
- Industrial tech
- Mining
- Grid modernization
- DOE innovation

Summary Impacts of Energy Act 2020 to Federal Sustainability Community (ppt)-summarizes effects of EA2020, EO 13990 and EO 14008

Energy Act of 2020 VHA Interim Guidance

- Internal Document?
- May be related to the 2022 sustainability plan, but is not found externally

Guiding Principles for Sustainable Federal Buildings (2020)

- Response to/Complies with
 - **EO 13834/13834 Implementing Instructions**
 - later revoked (Jan/Dec 2021)
 - Comments here reflect document as-printed (when 13834 was intact)
 - EISA 2007 (high-perf. green bldg.)
 - Various items from U.S.C.
 - Env. Prot. Act of 1969
 - Other Codes, guidelines, and tools
- 6 Principles
 1. Employ Integrated Design Principles
 2. Optimize Energy Performance
 3. Protect and Conserve Water
 4. Enhance the Indoor Environment
 5. Reduce the Environmental Impact of Materials
 6. Assess and Consider Building Resilience

Guiding Principles for Sustainable Federal Buildings (2020) – cont.

- Provides Checklists for Facility Managers to:
 - Assess New Construction Projects Using Guiding Principles
 - Assess Existing Buildings Using Guiding Principles
 - Assess New Projects/Existing Buildings using 3rd Party Certification
 - Re-Assess a building for continued certification using the Guiding Principles.
- Provides reporting Requirements

1.0 - Employ Integrated Design Principles			
EB Criteria 1.1	Integrated Design and Management	CORE	
		(Std)	
Ensure that sustainability goals for the operation of the building are established and are incorporated into the building's Operations and Maintenance (O&M) procedures. If a renovation project is planned in the building, ensure that sustainability goals have been developed as part of the project to meet the Guiding Principles and that they are incorporated into applicable project design documents.			
AND ONE OF THE FOLLOWING OPTIONS:			
Option 1	Use a collaborative, integrated process team tailored to the size and function of the building to plan, program, operate, and maintain the building. Ensure opportunities to optimize energy, water, materials, indoor environmental quality, recycling and composting, occupant health and wellness, transportation (including public transit, safety, parking, and electric vehicle charging), siting and landscape, the protection of historic properties and other cultural resources, community integration, and building resilience continue to be considered, supporting the building's function and mission throughout the life of the building.		
Option 2	For buildings with renovation projects, use a collaborative, integrated process and team tailored to the size and function of the building to plan, program, design, construct, commission, and transition to operation the building renovation. Identify team members and roles. Ensure all opportunities from Option 1 are considered in the project.		
Option 3	For buildings with renovation projects, use an integrated design process consistent with 2018 IgCC Appendix F Integrated Design .		
EB Criteria 1.2	Sustainable Siting	NON-CORE	
		(S)	(C/I)
Follow all relevant requirements of 41 CFR § 102-76.20 of the Federal Management Regulation to make a positive contribution to the surrounding landscape, and comply with the National Environmental Policy Act of 1969, as amended, 42 U.S.C. § 4321 et seq., and the National Historic Preservation Act of 1966, as amended, 54 U.S.C. Subtitle III, Division A .			
AND ONE OF THE FOLLOWING OPTIONS:			
Option 1	In alignment with sustainable siting best practices, assess any relevant opportunities for continued protections and potential enhancements to the site's sustainability and engage with building occupants. The specific actions of the site enhancements or optimization should reflect the scope and complexity of the proposed project or building and include, as applicable and technically feasible, the following: 1) mitigate any potential or existing impacts to neighboring prime farmland; 2) take action to enhance, mitigate, and preserve existing areas with permeable soils; 3) minimize potential harm to or within the floodplain; 4) protect and conserve existing landscapes, wetlands, forest, and wilderness areas; 5) if impacting site, minimize site disturbance; 6) implement policies and programs to preserve threatened or endangered species and their habitats, including pollinators' habitats; 7) optimize linkages and connections to surrounding destinations and neighborhoods; 8) continue use of historic properties, especially those located in central business districts; and 9) enhance appropriate security design parameters.		

Sustainable Facilities Tool

- GSA Website
- Provides links to several training resources, learning topics and links to various tools

Key links at site

- [Energy Facility Topics](#)
- [Cost-Effective Upgrades assessment tool](#)
- [Career training/compliance training](#) (requires login)
- [Sustainability project guidelines and tools](#)

ISO 50001 (2018)

Contains [playbook tasks](#) to measure, benchmark and address energy use items.

Designed for facility/energy managers to better understand Energy Conservation Measures and to implement an energy management system.

[From ISO website:](#)

- Develop a policy for more efficient use of energy
- Fix targets and objectives to meet the policy
- Use data to better understand and make decisions about energy use
- Measure the results
- Review how well the policy works, and
- Continually improve energy management

ASHRAE 90.1

Energy Standard for Sites and Buildings Except Low-Rise Residential Buildings

- Defines energy metrics to be met via 2 paths
 - Prescriptive (defines efficiencies of equipment/systems)
 - Total Systems Performance Ratio - TSPR (energy analysis of entire building allows for tradeoffs)
- 2022 version includes guidance for alternative assessment methods (carbon, site/source energy)
- Updated every 3 years.
- Organizational publication, requires adoption, check current adoption requirements
- Additional ASHRAE standards
- 189.1 Standard for the Design of high-performance Green Buildings
- 36 High Performance Sequences of Operation for HVAC Systems

EO 13834: Efficient Federal Operations (revoked)

- Issued May, 2018
- Implementing Document Published April, 2019
- Referenced in most recent **Guiding Principles document-Dec 2020**
- Partially revoked by EO 13990 (Jan 20, 2021)
- **Directive 0056** was re-issued August 31, 2021
 - Makes reference to 13834 and Implementing Document (no mention of partial revocation)
- Fully Revoked by **EO 14057** (Dec 13, 2021)
- **Implementing Instructions for EO 14057** were issued by the White House Council on Environmental Quality (Aug, 2022).

Interpretation by author

- Bulk of EO is generalized guidance to reduce use of water/energy, along with responsibilities of Agency Executives to implement and assess current procedures and weigh proposed actions.
- Assume contents of Implementing Document are still valid, even though the EO itself has been revoked.
- EO 13834 granted the Council on Environmental Quality (CEQ) the ability to amend directives from 13834 and its implementing instructions. Since the EO and the allowance within it were soon revoked, the implementing instructions are treated as if intact.
- Since 14057 fully revoked 13834, and since the implementing instructions for EO 14057 largely in parallel or overlap the intent and content of the 13834 documents, 13834 was ignored in this document.

EO 14057: Catalyzing Clean Energy Industries and Jobs Through Federal Sustainability

- Issued December 08, 2021
- Outlines plan to achieve environmental goals, including:
 - Reduce fleet emissions (ZEV procurement)
 - 50% building emissions reduction by 2032
 - Net-zero building portfolio by 2045
 - 65% reduction in Greenhouse gases from 2008 levels by 2030
 - Net-zero emissions from Federal procurement, including promotion of construction materials with lower embodied carbon.
- Agency heads develop targets, sustain. plan
 - Plans to be reviewed and progress annually reviewed by CEQ and OMB
- Establishes Working groups for all targets
 - Each working group requires regular reporting
- Coordinates with EOs 13985, 13990, 14005, 14008, 14017, 14030
- Achieving targets will require:
 - Prioritization of energy efficiency
 - pursuit of building electrification
 - Phase-out of on-site fossil fuel use
 - Pursue pollution free energy retrofits
 - Whole-building commissioning
 - Space reduction/consolidation
 - ECMs
 - Implement **Guiding Principles**
 - Performance contracting (**Energy Act of 2020, section 1002**)
- Office of Personnel Management will develop plan for expanding sustainability and climate training
- (Re-)Establishes Federal Chief Sustainability Officer
 - Funded by EPA
- Agency heads can apply for exemptions to compliance requirements

Implementing Instructions for EO 14057

- Agencies must make their own Sustainability Plan
 - Sustainability and Climate Action Plans must be developed annually
 - Plan reporting timeline set by agency (default is yearly, June 30)
 - Targets for scope 1,2. reduction plans for 3.
- Various reporting requirements as well, many require local data
 - Energy/water use and metering
 - GHG emissions, CFE
 - Benchmarking and audit reporting
 - Implementation of ECMs and investments in efficiency
- Reporting Requirements (agency)-section 3.4
 - Annual Energy Management Data Report to DOE-FEMP
 - EISA (2007) 432 Compliance tracking
 - FAST (DOE) for vehicles
 - Federal Real Property Profile Management System (FRPP-MS) to GSA for real property data and sustainable building data
- Emission Scopes:
 - 1-from agency-owned sources (cars, boilers, construction)
 - 2-as a result of purchased energy (steam, electric)
 - 3-from non-owned sources, generated in agency-related activities (travel, energy transmission losses, employee commutes)

VA Sustainable Design Manual

- Compliance required for all construction, renovation and non-recurring maintenance
- For major and minor construction projects
- Requirements for Integrated Design, LCCA, energy modeling, and Commissioning
- Guidelines for implementing renewable energy
- Cites Guiding Principles
- Requires systems sub-metering (depending on building SF and system)
- Current version (2017) requires 30% improvement of building performance from ASHRAE 90.1-2007

VA Sustainable Buildings Sharepoint Site

- Comply with sustainable building requirements per Dir. 0056
- Federal Real Property Profile Reporting
- OAEM Internal Certification instructions for compliance with Dir. 0056
- Centralized Staff Training Resources (Dir. 0056)
- Not externally accessible

Appendix B

?

Workforce Development-Step 3

Execute ECMs-Common ECMs

HVAC

- Equipment Preventative Maintenance

Infiltration

- Seal windows and doors

Controls

- Demand-based
- Occupancy-based
- Optimum Start/Stop
- Time-based
- Variable Speed equipment
- Economization

Monitoring

- Equipment energy consumption
- Supply/return temperatures

Water

- Low-Flow and/or Low Consumption devices

Equipment

- Steam Trap Replacement

Insulation

- Piping/Duct
- Envelope

Electrical/Lighting

- Upgrade to LEDs
- Utilize Daylighting and smart lighting controls
- Exterior Lighting and controls

Others

See Sustainable buildings tool for more examples of low-hanging fruit by visiting the [cost-effective upgrades tool](#) at the Sustainable Facilities Tool website