

Executive Sponsors:

David Margalit

Project Sponsors:

Michael Colgrove

Empire Belt:

Sarah Rambacher

Team Lead:

James Mannarino

Project Team:

Lee Butler

Loic Chappoz

Dean Zias

Dan Cogan

Karin Lang

Jackie Albanese

Heather Nolan

VOICE OF CUSTOMER

“Takes too long”

“Inconsistency among reviewers”

“Little understanding of the ERP process”

“Software limitations”

“Streamline data entry for utility analysis”

“Would like a designated contact”

“Create a central place for information”

Multifamily Performance Program’s Energy Reduction Plan Process

BACKGROUND

NYSERDA’s Multifamily Performance Program (MPP) for Existing Buildings provides a portfolio of programs and incentives for owners, facility managers, developers, and condo/co-op boards of multifamily buildings with five or more units to increase their building’s energy efficiency. Approved contractors, called Multifamily Performance Partners, work with applicants by providing a thorough knowledge of potential energy efficiency measures and improvements, their performance criteria, cost, and availability. Upon approval of an application by NYSERDA, the Partner works with the applicant to develop and submit an Energy Reduction Plan (ERP). In order to move the project through the process, Program staff spends a significant amount of time communicating with the Partners, which ends up delaying the project’s approval. It also creates a burden for the Partners to modify their internal reporting of their energy models and calculations to fit MPP’s template.

PROBLEM SUMMARY

15 DAYS for utility analysis review

26 DAYS ERP is with project manager

14% quality rate for utility analysis review

4% quality rate of ERP Rev0s by project manager

Top Problem Areas

- High rejection rate of ERP review from project manager
- Process/tool is too complex for the customer
- No standardized internal processes
- Too time consuming
- Quality of inputs is poor

Root Causes of Problems

- No rejection method for ERPs
- Subjective process for ERP review
- Variance in process training for project managers
- Too many manual checks being completed

GOALS & OBJECTIVES

10 DAYS for utility analysis review

20 DAYS ERP is with project manager

50% quality rate for utility analysis review

30% quality rate of ERP Rev0s by project manager

KAIZEN TAKEAWAYS

	HARD	Difficulty	EASY
HIGH	<ul style="list-style-type: none"> • Simplify ERP data entry • “ERP Complete” button with ERROR message if data missing • Accept Investor Confidence Project’s QC-approved ERPs • Eliminate TRC Test • Separate utility data analysis from the audit/ statement of work development and approval • Develop new platform to automate reviews 		<ul style="list-style-type: none"> • Assign Partners to project managers • Establish dedicated ERP reviewers • Add utility data checks into the ERP tool • Kick back ERP tool early if QA/QC tab is not filled out • “Approved as noted” more often
LOW	<ul style="list-style-type: none"> • Move utility analysis earlier in the process • Pre-approved date in CRIS should notify TRC • Use macros to enable data entry into ERP by Partners • Insert photos into ERP tool • Partner uploads ERP tool to database 		<ul style="list-style-type: none"> • Standardize ERP approval process for all project managers • TRC prepopulate ERP fields based on application • Develop feedback mechanism for quality of ERP quality control • Stop Partners from batching ERP submissions

Implementation

- ✓ Update project manager checklist and ensure universal access
- ✓ Evaluate time to get macros built into ERP and feed into screening tool
- ✓ Build and roll out administrator checklist to Partner network
- ✓ ERP Process Review Checklist and ensure universal access
- ✓ Train project managers on ERP review
- ✓ Develop proposal/statement of work to start feedback loop on project manager reviews
- ✓ Create “bus schedule” for project managers
- ✓ Propose sampling protocol
- ✓ Review of quality control working group
- ✓ Research an external utility analysis tool for Partners

Parking Lot

- Revise ERP tool
- Hold a revamp scoping session
- Create an “out of scope” correction for ERPs
- Have a pre-approval date for Part 1 and receive ERP
- Evaluate purpose of site inspection and inspection forms
- Research the cost of issuing incentives

RESULTS TO DATE FEBRUARY 2016

6 DAYS for utility analysis review

24 DAYS ERP is with project manager

75% quality rate of utility analysis review

70% quality rate of ERPs by project manager