

RCx Planning Workshop Sample Agenda

Day 1:

Introductions

What is RCx (definitions, mandates, statistics/benefits, phases/skills)

Summary of Deliverables: RCx Plan and Current Facility Requirements (CFR)

Overview of the RCx Planning Process

Summary of utilities evaluation, comfort surveys, and maintenance work orders/surveys

Summary of potential benefits, savings, and budgets for organization

Overview of RCx team roles and responsibilities

Establish RCx Selection Criteria (e.g., > 40 KSF, > 1960s, no major renovations planned within 5 years, installed meters, BAS or BAS ready, prioritize high energy intensity or poor benchmarking performance, comfort/maintenance issues etc.)

Overview of RCx Strategies

Overview of In-House and Execution Vehicles

Overview of M&V Options

Daily Summary: emergence of organizational goals from RCx descriptions and tactics

Day 2

Morning summary: summarize yesterday, look ahead for today, and explain breakout sessions for applying RCx selection criteria

Applying RCx Selection Criteria: SF, age, meters, and renovation plans

Applying RCx Selection Criteria: energy performance

Applying RCx Selection Criteria: maintenance issues

Applying RCx Selection Criteria: comfort issues

Presentation of Selection Criteria Results

Discussion of Building Prioritization Tactics

Discussion of In-House Opportunities: RCx planning, scoping, testing/analysis, implementation, M%V

Discussion of Additional Execution Options

Daily Wrap-up: emergence of 4-year RCx priority building list and preferred execution strategies

Day 3

Morning summary: summarize yesterday, look ahead for today

Presentation of prioritized RCx 4-year list grouped by year and building type (identify supplementary audit list)

Identify energy drivers from utilities evaluation and bin data pivot table tool illustrating the type of data analysis employed and potential opportunities revealed

Presentation on what tasks take place within each RCx phase

Identify gaps in EBCx team members, in-house training/personnel, equipment, and contracted services

Review standard RCx scope of work and tailor services to meet gaps; identify mechanisms for meeting in-house gaps in training, equipment, labor, etc

Present standard CFR template and other key System Manual documents

Group buildings by category and breakout into teams to review and edit CFR template (provide varying degrees of detail or aggressiveness)

Based on edited template, fill in one representative building's information per team to complete CFRs

Present completed CFRs, identify gaps or assumptions needed to finalize

Daily Wrap-up: emergence of solutions to fill RCx services gaps and organization CFR templates

Day 4

Morning summary: summarize yesterday, look ahead for final day

Interview facilities personnel to obtain building missions, hours, space needs, comfort goals, etc

Interview facilities maintenance to obtain O&M goals, concerns, sequences, review, etc

Additional info gathering as nec to finalize categorical CFR docs and list action items

Present week's progress and results to organizational and maintenance leadership

Digital Feedback (using on-site computer survey systems)