Smart Management for Small Water Systems

Progress Tracking and Reporting

EFCN environmental finance center network

American Water Works Association

UNC Environmental Finance Center

This program is made possible under a cooperative agreement with EPA.

Energy Management Program - Basic Steps

- Step 1. Establish Organizational Commitment
- Step 2. Develop a Baseline of Energy Use
- Step 3. Evaluate the System and Collect Data
- Step 4. Identify Energy Efficiency Opportunities
- Step 5. Prioritize Opportunities for Implementation
- Step 6. Develop an Implementation Plan
- Step 7. Provide for Progress Tracking and Reporting

Source: NYSERDA

Progress Tracking and Reporting

Why Track Your Progress?

- Know what success looks like:
  - Completing all tasks
  - In the timeframe in your implementation plan
  - Little / no negative impact on daily operations, treatment performance, or staff activity
- Make sure projects are delivering the savings you targeted – monitor and course correct

What Do You Track?

- What do you already track for energy projects?
- What kinds would you like to track and why?
- For non-energy projects, what sorts of metrics do you track?

What to Track:

- Consider your project prioritization process
- You can track progress toward what you prioritized:
  - Cost savings / Energy savings
  - Progress towards regulatory compliance goals
  - Progress towards level of service goals
  - Implementation cost
  - Time elapsed
  - Progress towards a larger project

What to Track:

Task	Task completion (1 to 5, %, etc.)	Projected costs	Actual costs	Projected savings	Actual savings	Outcomes

What's Important to Your Funder?

- This is a key question as to what you might track in your progress tracking
  - GHGs?
  - Energy savings?
  - Labor used (e.g. Davis-Bacon reporting under ARRA)?
  - Other factors?
- Also, what is important to your Board?

NYSERDA's Keys to Success

- Track metrics so benefits of project can be measured
- Reporting generates follow-up activities

Virtuous cycle of energy management

Be S.M.A.R.T. About Targets

S = Specific

Is it clear and focused to avoid misinterpretation?

Be S.M.A.R.T. About Targets

M = Measurable

Can it be quantified and compared to other data?

Be S.M.A.R.T. About Targets

A = Attainable

Is it achievable and reasonable under normal conditions?

Be S.M.A.R.T. About Targets

R = Realistic / Relevant

Is it cost-effective and can it be done by the facility?

Be S.M.A.R.T. About Targets

T = Timely / Time Based

Is it doable within your given timeframe?

Let's Play: Good or Not Good
~ The Targets Edition ~ (1/5)

"I want our plant to be better than the plant in the next town."

GOOD

NOT GOOD

Let's Play: Good or Not Good ~ The Targets Edition ~ (2/5)

"We will decrease energy consumption by 50% within the next 5 years."

GOOD

NOT GOOD

Let's Play: Good or Not Good ~ The Targets Edition ~ (3/5)

"We will be the most energy efficient treatment plant in the state."

GOOD

NOT GOOD

Let's Play: Good or Not Good ~ The Targets Edition ~ (4/5)

"I want to install VFDs on all of our pumps, one every quarter."

GOOD

NOT GOOD

Let's Play: Good or Not Good ~ The Targets Edition ~ (5/5)

"My subordinate will monitor and log energy usage 24 hours a day, 7 days a week."

GOOD

NOT GOOD