



BEDES Strategic Working Group

Fourth Meeting--Tuesday June 17, 2014 (1:00-5:00 EDT)

Face-to-Face/Bi-Coastal/Video-Linked Meeting:

East Coast: U.S. DOE, 950 L'Enfant Plaza, Washington D.C. (rooms 6097-6099)

West Coast: LBNL, Building 90, Berkeley, CA (room 3122)

Convener: Rick Diamond, LBNL

Facilitator: Dr. Jonathan Raab, Raab Associates, Ltd.

DRAFT Meeting Summary

25 people attended the SWG meeting either in person in DC or at LBNL or by phone (see attendee list in Attachment 1)

1:00 Introduction and Today's Agenda

Rick welcomed people—said using whole brain (not just TWG left and SWG right), and gave a little history of evolution of Webster development of English dictionary and how relates to BEDES. Jonathan reviewed the agenda.

1:15 Recap on TWG Issues of Relevance to SWG

Rick reviewed five slides summarizing the TWG meeting from the previous day (6/16/14) on Envelope, Measures, Energy Generation/Storage, and Controls/Operations and Compliance/Compatibility (see SWG slides [HERE](#)). No one had any corrections or additions.

1:30 BEDES Implementation Issues

A) Models for Hosting—

- a. Rick reviewed the 7 criteria that the SWG developed at previous meeting (see SWG slides [HERE](#)). From past discussion we identified two potential models to potentially meet the criteria—1) open source hosting (user community contributes and determines best practices) and 2) Hybrid model (public sector host for a new non profit).
- b. There was then a brief presentation from new LBNL employee Rahul Chopra who is a former venture capital/CEO. He commented that when you make information available in an open source environment it can get wider use and input. Some of the important ingredients according to

Rahul is that a host organization should have no commercial interest, a clear charter, financial resources, and have subject-matter expertise, as well as being an active market developer. He then reviewed several other comparable efforts:

- i. **Core Infrastructure Initiative:** (hosted at Linux with active contributors including Amazon, Cisco, Microsoft, etc. They tackle any problems that could affect the internet backbone (bugs, etc.). A Steering Committee reviews and approves projects.
 - ii. **Institute of Social Science Research** (University of Michigan, Reuters): — \$80 million/year; develops the Consumer Price Index; receives grants, sponsorships, and royalties from data monetization
 - iii. **Case-Schiller Home Price Indices:** Started at Yale/Department of Labor initial funding; royalties from data monetization
 - iv. **Hadoop Ecosystem** (Apache foundation): Enlisted Yahoo as partner to string together modules and donate data. Common interface for multiple modules
 - v. **Mongo DB:** A database to host anything. Multimedia, ticketing (used for Olympics). Not for profit with a commercial partner (Mongo DB.com) if users want extended support.
- c. During the ensuing discussion with the SWG, the following points were made by one or more participants:
- i. Funding is critical both to start and sustain an organization; could have fee support or membership (end users and software developers)
 - ii. These examples are open source to the extent that the products/data are available to public; but with a process for making changes that must be approved by a committee.
 - iii. Most are providing data which the host organization can charge for, while BEDES as dictionary and data exchange specification may not be revenue generating in same way. Also, end users such as local government w/benchmarking ordinances may have the least resources to contribute.
 - iv. People will often pay to get logos like BEDES on their letterhead (plus some additional services.) BEDES could charge for compliance review and certification. DOE will adopt BEDES into its tools and others are saying in RFPs that projects need to be BEDES compliant. (USGBC is revenue neutral on compliance checking but makes money on membership.)
 - v. Regarding the 9-12 month startup of a nonprofit: You can become a “project” (fiscal sponsor) of an existing nonprofit with the intent to spin off a separate non-profit when the project is ready.
- d. Potential BEDES Hosts—IMT, EDF, NRDC, or Bloomberg/Google Foundation

B) Compatibility and Compliance

- a. Robin presented a slide on compatibility and compliance and raised several questions/issues for the SWG's consideration. The following points were made during the ensuing discussion:
 - i. Is compliant supposed to be more stringent than compatible?
 - ii. To be "compliant" all definitions should be the same even if terms are different--and therefore can be mapped to each other (and information could be exported)
 - iii. In theory "compatible" could mean consistent with BEDES compliant use case/schema
 - iv. Use cases (which could have an XML schema) would be certified as compliant;
 - v. Do we even need the term "compatibility?"
 - vi. Can develop and register a use case; or can use BEDES on own w/o registering it if you want to keep it proprietary
 - vii. To be BEDES compliant do not need to include all the BEDES terms or *only* have BEDES terms, as long as all the BEDES related fields can be mapped to a BEDES term.
 - viii. It was assumed that the host organization for BEDES would certify compliance with BEDES; and that there would likely need to be an interim strategy until the hosting organization is fully established (either DOE/LBNL is certifying compliance in the interim, a peer review group is established, or a different name besides "compliance" is used in the interim).
- b. Over the LBNL lunch break, the D.C. group put together the following proposal for the full group's consideration
 - i. *Drop the "compatible" term and only focus on "compliance"*
 - ii. *For fields that BEDES definition cover, exported/imported fields are in BEDES terms;*
 - iii. *Additional non-BEDES related fields may be included in the export;*
 - iv. *Also can have something that's mapped but leaving import/export to others.*
- c. The SWG agreed to consider this further, and Elena agreed to flesh out a bit further and post a forum topic on "compliance"

C) BEDES Pilots

- a. SWG discussed various options for BEDES related pilots including the following:
 - i. **DOE/EPA:** DOE/EPA plan to make BPD, SEED, and Portfolio Manager "compliant" w/BEDES, so no further discussion needed now
 - ii. **Audit Use Case** (Bob Hendron, NREL): Commercial Building Audit schema which proposes new BEDES terms that will be applicable to BEDES Module 2 development; schema has hierarchical structure; have HXML under development and testing; partnering w/San Francisco and several other pilots; San Francisco (and

- other partners) will be field testing audit use case and hopefully lead to more formal BEDES pilots
- iii. **California** (Marc Costa): Planning to convene a group of California stakeholders at ACEEE Summer Study to design a pilot. CA is currently collecting data that could be put to use in a benchmarking disclosure ordinance tool including assessor data, online permitting (completed by year end); and region-wide analysis of energy consumption and EE potential data.
 - iv. **Other:** NEEP had some ideas for pilots in Massachusetts/Vermont; Elena reported that some real estate developers are considering making BEDES compliance a requirements for RFPs; and D.C. and other cities are using SEED (which will use BEEDs) for data collection

D) Website

- a. LBNL presented a proposal for scope of initial BEDES website following the release of BEDES 1.0 this fall (BEDES completion date is 9/30) to include:
 - i. The dictionary (that could be searchable and sortable in a later version);
 - ii. a forum for proposing new terms/definitions; and
 - iii. an area to post BEDES-compliant schemas and mappings as they become available
- b. During the ensuing discussion one or more SWG members made the following suggestions:
 - i. Allow contributors to propose changes to existing terms (although only change definitions periodically as can put people of compliance)
 - ii. Make the website user friendly so that external stakeholders that haven't been involved during the BEDES development process can understand it
 - iii. Host organization would likely determine compliance, but could take a year or so to put host organization in place
 - iv. Show the mapping already done between BEDES and other key specifications
 - v. Example on how XML schema would work, would be helpful
 - vi. Also, good if BEDES available as large spreadsheet

E) Next Steps and To Do List

- a. LBNL completes terms and definitions—post queries to the Forum
- b. LBNL develops draft implementation plan, circulate for review prior to September SWG meeting
- c. LBNL/DOE hold a discussion session at ACEEE Summer Study in August on potential California pilot
- d. DOE/LBNL (Elena) post proposed definition/process for “compatibility” definition and certification on forum for discussion

- e. Raab Associates prepares meeting summary of 4th SWG and agenda for 5th SWG

Attachment 1: SWG #4 Attendees

Berkeley

1. Amir Roth
2. Magnus Cheifetz
3. Mark Costa
4. Steve Abercrombie
5. Bob Hendron
6. Devan Johnson
7. Avery Kintner
8. Jessie Knapstein
9. Rick Diamond
10. Shankar Earni
11. Lindsay Holiday
12. John Mejia
13. Robin Mitchell

Readytalk (phone)

14. Gregory Thomas
15. Dan Harris
16. Andrew Fritsch
17. Ash Banerjee
18. Carmen Best
19. Mike Brauch
20. Jason Antonoff

Washington, D.C.

21. Nora Wang
22. Marshall Duer-Balkin
23. Elena Alschuler
24. Andrea Mercado
25. Jonathan Raab