

# Operation and Maintenance (O&M) Working Group Update

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# Working Group Highlights

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- **Date Formed:** January 15, 2004
- **Objective:** Develop recommended procedures for documentation and reporting of post- installation Government and ESCO Operations, Maintenance, Repair & Replacement Activities.
- **Current Status:** Prepared a draft Project Documentation Structure
- **Team Members:** Bob Baugh, Mike Cross, Jerry Culbert, Natale Didonato, Randal Duncan, Sam Farouz, Max Hogan, Dave Howard, Dave Hunt, Erik Koehling, Satish Kumar, Will Lintner, Michael Parker, Rick Rogers, Dale Sartor, Bobby Starling, Jason Stone, Kevin Sullivan, Lia Webster, David Williams

# Background

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- Need for proper O&M reporting and accurate O&M savings determination in all ESPC project:
  - O&M savings estimates have come under increasing scrutiny
  - O&M reporting process should clearly identify parties responsible for different O&M tasks
  - Good O&M reporting will protect both parties in case of disagreements
- Formation of O&M Working Group proposed at the New York City M&V Summit

# Current Status

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- Researching the concerns of watch dog organizations on O&M savings
- Preparing ECM specific O&M checklists – To be filled out by the responsible party
- Coordinating O&M reporting with other reporting documents (both past and present)

# O&M Checklists

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- Who is responsible?
- What are the O&M tasks that needs to be performed?
- What is the frequency of the O&M activities?
- What is the process governing the creation, handing out, filling out, and archiving of these checklists?
- What are the technologies/ECMs that are currently covered?

# Sample Checklists

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- Monthly Preventive Maintenance Sheet For Hot Water System
- Power Plant Maintenance Worksheet

# Future Issues

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- Plans to develop 6-10 O&M checklists for specific ECMs
  - Looking to ESCOs to provide examples of checklists
- Get input from agency personnel on the checklists
  - Looking to agency reps to circulate the draft checklists to people responsible for O&M of federal facilities; pass back the comments to the WG
- Coordination with other working group activities and reporting outlines
  - Interface with Cx Working Group on the Cx process flow and how and where O&M will fit into it
  - Interface with M&V Plan and Reporting Integration Working Group to include the O&M reporting requirements

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