

BERDO REVIEW BOARD PUBLIC MEETING

March 11, 2024



Mayor Michelle Wu

BERDO Review Board



Rashida Boyd

Board Member



Stephen Ellis

Board Member



Lovette Jacobs

Board Member



Gail Latimore

Board Member



Lee Matsueda

Board Member



Jack Nelson

Board Member



Matt O'Malley

Board Member

City of Boston Staff



**Diana
Vasquez**

*BERDO Review
Board Manager*



**Hannah
Payne**

*Director, Carbon
Neutrality*

Agenda

Today's Meeting



- 1. Approval of Meeting Minutes**
- 2. Discussion and Vote on Procedures for 2024 BERDO Reporting and Verification**
- 3. Discussion on Equitable Emissions Investment Fund**
- 4. Administrative Updates**
- 5. Meeting Adjournment**

Approval of Meeting Minutes

Board votes on approving previous meeting's minutes

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Procedure for BERDO Reporting & Verification Extensions

Discussion and Vote

Procedure for requesting alternative reporting dates

Required in the [Ordinance](#) and [Regulations](#)

Ordinance Language

“The Review Board shall develop a **procedure for establishing alternative reporting dates** for Building Owners who supply timely notification of **extenuating circumstances**.”

Regulations Language

“A request must **explain the extenuating circumstances** that make an Owner unable to complete the report or third-party data verification by the deadline and must be submitted prior to the applicable deadline. Such requests must comply with any procedures created by the Review Board...The Review Board may grant a request for an alternative reporting date and/or third-party verification deadline for a period not to exceed six months.”

Background

Reporting Deadline and Context



Reporting deadline this year is May 15

- This is for 2023 energy and water data.

Context

- Due to significant updates in reporting in 2022, extensions were available to all who requested in 2022 and 2023.
- The BERDO team does not anticipate blanket extensions going forward.
- The Review Board has authority to develop a procedure for establishing alternative reporting dates for Building Owners who supply timely notification of extenuating circumstances.

Proposed Procedure

Proposal:

The Review Board delegates authority to approve three-month extension requests to the Environment Department for building owners with **extenuating circumstances** who file **starting on May 1**.

Proposed Filing Procedure:

Building owners who cannot meet the May 15, 2024 deadline can file for **up to two**, three-month extensions for the following circumstances:

- *Despite receiving a timely request, one or more utility has been unable to provide necessary data. Assistance in obtaining data has been sought from the BERDO team and communications with the utility have been documented.*
- *A building owner has to verify their 2023 data and despite a timely request, the verifier will not be able to complete the verification by the May 15 deadline. The verifier has documented an estimated date when the verification will be complete.*
- *A building owner is waiting on information from the BERDO team that is necessary to complete reporting. The nature of this information has been documented.*
- *Other (please explain)*

Proposed Process

Extension Request in Touchstone

To file an extension request, a building owner would:

1. Log into the BERDO reporting platform (Touchstone).
2. Select extensions requests option within the “Actions” menu.
3. When taken to the extension request page, select the circumstance(s) they are facing and attach any supporting documentation.

On the administrative side:

The BERDO team will review the request, confirm documentation or request additional documentation, and then respond to the request in Touchstone to:

- *Approve the request; or*
- *Deny the request*

Extension Request Form



Current Extensions

Submitted	Status	New Deadline if Approved
No Matching Results		
Data is not available for this section		


Reporting extensions may be granted for extenuating circumstances. Please select a reason why you are unable to complete reporting by the deadline date listed in your buildings table.

Reason

- One or more utility is unable to provide necessary data in time
- I have engaged a third-party verifier but they are unable to complete the work before the deadline date
- I am waiting for information from the BERDO team to complete reporting
- Other (please explain)

Please upload any documentation that demonstrates your extenuating circumstance. Examples could include emails from utility companies, letters from third-party verifiers, and other relevant correspondence.

Attach Documentation



Choose a file or drag and drop

Reporting extensions may be granted to August 15, 2023 for extenuating circumstances. Please select a reason why you are unable to complete reporting by the deadline date listed in your buildings table.

Submit

The BERDO team is prepared to develop guidance in the How to Report Guide on this process for building owners should the Review Board approve.

Proposed Next Steps

Vote on Proposal

Staff request the Board to:

- Open a vote on the following proposal: The Review Board delegates authority to the Environment Department this year to approve three-month extension requests for building owners facing extenuating circumstances, contingent upon adherence to the outlined filing process.

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Board Q&A

Board Members may discuss and ask staff questions

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Board Motion & Vote

Board Members may make a motion and vote

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Equitable Emissions Investment Fund

Update and Discussion



Equitable Emissions Investment Fund

Review from last meeting

The BERDO team presented

- A draft project evaluation form
- A proposed application outline

The Review Board requested

- A draft survey that could be shared with the public in conjunction with draft evaluation form and application outline. The drafted survey seeks to find information regarding:
 - *Applicant types (building owners, tenants, service providers)*
 - *Building types*
 - *Amount*
 - *Project types (scoping, mid-phase, etc.)*

Draft Fund Survey

[For potential applicants](#)



Anonymous survey with the following questions

1. Were you aware of the Equitable Emissions Investment Fund?
 - Yes
 - No
 - Other: _____

2. Based on the description of the Fund above, would you be interested in applying?
 - Yes
 - No
 - Other: _____

3. What is your relationship to building(s) you would be interested in applying to the Fund for?
 - *I am the building owner*
 - *I am a long-term tenant of the building*
 - *I am a service provider that helps building owners with emissions reductions*
 - Other: _____

Draft Fund Survey



Continued

4. What kind of building(s) would you be interested in applying to the Fund for? (i.e. community health center, residential, house of worship, etc.)
 - a. Short answer

5. What kinds of decarbonization projects are you interested in?
 - ❑ Energy efficiency improvements (upgrading building envelopes, improving insulation, replacing old appliances, etc.)
 - ❑ Renewable energy procurement (using renewable energy such as solar, wind, or geothermal)
 - ❑ Switching fuel types (switching heating and cooling systems from fossil fuel-based systems to cleaner alternative like heat pumps)
 - ❑ Other: _____

6. What stage are you currently in regarding building decarbonization project plans?
 - ❑ I am interested in scoping and researching potential projects (no decarbonization project plan has been selected)
 - ❑ I am interested in designing a potential project (a decarbonization project has been selected)
 - ❑ I am interested in finding funding for a phase of an existing long-term project (a decarbonization project is underway)
 - ❑ Other: _____

Draft Fund Survey

Continued



7. What range of funding are you interested in?

- \$5,000 - 10,000
- \$10,000 - 50,000
- \$50,000 - 500,000
- \$500,000 - 1,000,000
- \$1,000,000 - 3,000,000
- *Unsure*

8. Which of the following Environmental Justice benefits do you think you could incorporate into a proposed project for the Fund?

- Benefits to affordable housing*
- Benefits to tenants*
- Benefits to labor and workforce development*
- Benefits to outdoor air quality*
- Benefits to indoor air quality and quality of life*
- Climate resilience benefits*
- Energy justice benefits*
- Other_____*

Draft Fund Survey

Continued

9. Provide a brief explanation for any of the selected Environmental Justice benefit(s) selected.
 - a. *Short answer*
10. Is there anything else you would like to mention regarding the draft project evaluation form, the draft application outline, or the Fund in general? You may also email input to BerdoReviewBoard@boston.gov.
 - a. *Short answer*

Next Steps

If Board agrees, we will move forward with:

1. Sharing the following resources with the public for input:
 - *Draft project evaluation form*
 - *Draft application outline*
 - *Fund Survey*
2. Present revised updates at an upcoming meeting.

CITY of BOSTON

Equitable Emissions Investment Fund Survey

Are you a building owner, resident, or entity acting on behalf of Boston buildings? Do you have a project in mind that can help reduce building energy use and/or emissions while providing benefits to environmental justice populations? If so, the City of Boston is looking for your insights!

[The Equitable Emissions Investment Fund](#) ("the Fund"), created under [BERDO \(Building Emissions Reduction and Disclosure Ordinance\)](#) will support the implementation and administration of local building carbon abatement projects that contribute to the City's emissions reduction goals and prioritize projects that benefit Environmental Justice Populations.

We are excited to announce its first application cycle is planned for this year! To better understand the types of projects that may be submitted and potential applicants that may be interested, we're seeking your input through a brief survey. Your responses will directly inform [the BERDO Review Board](#), the governing body responsible for allocating funds.

This survey will remain open until **March XX, 2024 at 5pm.**

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Board Q&A

Board Members may discuss and ask staff questions

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Public Comment Period

Members of the public may provide public comment

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Additional Administrative Updates

Staff presents administrative updates

Review Board Members

Update on Board seats

Councilor Gabriela “Gigi” Coletta’s

onboarding was rescheduled to later in March.

Will provide updates following this meeting.



City Councilor, District 1

Nomination form closed on Friday, March 8. We received a total of three nominees from:

- Community Labor United
- Jamaica Plain NDC
- Neighborhood Association of the Back Bay
- New England United 4 Justice
- Piers Park Sailing Center
- Reclaim Roxbury



Adjourn

Thank you! A recording and the slide deck for this meeting will be available on boston.gov/berdo-review-board.

