

BERDO COMPLIANCE WORKBOOK FOR CONDOS & CO-OPS



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WHY A BERDO WORKBOOK FOR CONDOS?



Boston's Building Emissions Reduction and Disclosure Ordinance (BERDO) is a local law that aims to reduce greenhouse gas emissions and air pollution from **Boston's largest buildings, which account for 40% of the city's carbon emissions**. BERDO should also help cooperatives (co-op) and condominiums (condos) reduce operating costs, improve resident health and comfort, and maintain property values.

The City of Boston created this resource to help building owners comply with BERDO by expanding on the guidance and tools available on the [BERDO website](#).

This workbook complements the existing **[BERDO Condo Handbook](#)**, which focuses more specifically on legal compliance and best practices. While the handbook is more of a reference guide, the workbook is meant to be a fillable tool to organize your building's data, discussions, and plans. Links to additional resources are included throughout the workbook.



40%

of the city's carbon emissions come from Boston's largest buildings

Who Is This Workbook For?

This workbook is designed for condo associations, co-op boards, and unit owners subject to BERDO. It can help users organize important information about their buildings, evaluate available options, and take steps toward compliance. Use this workbook when preparing for a board meeting, working with consultants or contractors, and planning upgrades.

How to Use This Workbook

This workbook:

- ✓ Outlines BERDO compliance options
- ✓ Offers guidance on effective compliance planning
- ✓ Gives actionable guidance on implementing building upgrades

This workbook is organized as a step-by-step process that guides you from understanding BERDO, to evaluating compliance and decarbonization options, to developing and implementing a Zero-over-Time plan. Each section concludes with a Section Recap checklist to help you review key takeaways, track your progress, and confirm you have the information needed before moving to the next stage. Even though this workbook is organized as a step-by-step process, you can start with the sections that are most relevant to your building's current needs.

➤ **Most resources referenced throughout this workbook can also be found on boston.gov/berdo.** Because BERDO requirements and resources may change over time, always refer to the City of Boston's website for the most current information.

SECTION 1 UNDERSTAND



SECTION 2 EVALUATE



SECTION 3 DEVELOP



SECTION 4 IMPLEMENT



KEY TERMS TO UNDERSTAND



Condominium: a multifamily building where residents individually own their units and share ownership of common areas through a condominium association.



Condominium Association: the organization responsible for managing and maintaining a condominium building's common areas, finances, and operations. Condominium associations are typically governed by a board of trustees or board of directors.



Cooperative (Co-op): a multifamily building owned by a cooperative corporation. Residents own shares in the corporation rather than their individual units. Co-ops are typically governed by a co-op board.



Board: the governing body responsible for overseeing building operations and decision-making. Depending on the building type, this may refer to a condominium board, board of trustees, board of directors, or co-op board.



Unit Owner/Shareholder: a resident with an ownership interest in the building. In condos, residents own individual units. In co-ops, residents own shares in the cooperative corporation.



Boston Community Choice Electricity (BCCE) "Green 100" Plan: BCCE is the City's program that procures renewable energy on behalf of residents and small businesses at affordable rates. The Green 100 Plan is an option to purchase 100% eligible renewable energy through the BCCE program.



Decarbonization: The process of eliminating greenhouse gas emissions from buildings by transitioning away from fossil fuels, maximizing energy efficiency, and using clean, renewable energy.



Emissions: Harmful gases released by burning fossil fuels for energy. Emissions contribute to climate change, cause air pollution, and negatively affect public health. Under BERDO, emissions are measured in kilograms of carbon dioxide equivalent, or kgCO₂e.



Renewable Energy Certificates (RECs): A digital record showing that renewable energy was generated and added to the power grid. Buying RECs shows your building uses renewable energy even if it is not physically connected to a wind turbine or a solar panel.



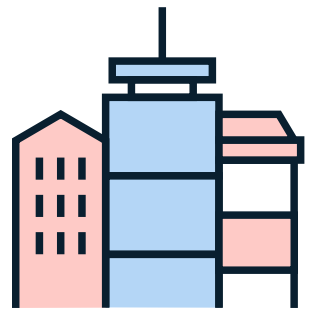
Zero-over-time (ZOT) planning: Making changes to your building step by step instead of all at once to achieve decarbonization.

➤ **Printing this workbook:** This workbook was designed to be used as a fillable PDF. It includes hyperlinks to resources, tools, and reference materials that may not be visible in a printed copy. If you plan to print the workbook, keep a copy of the PDF version handy so you have access to those links and resources.

**SECTION
1**

UNDERSTAND BERDO AND HOW TO WORK WITH YOUR ASSOCIATION

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OVERVIEW

This section provides an overview of BERDO and its key requirements to help you understand the basics, identify your building's obligations, and guide conversations with your association or board.

BERDO BASICS



WHAT IS BERDO?

- Boston's Building Emissions Reduction and Disclosure Ordinance (BERDO) is a local law that aims to reduce greenhouse gas emissions and air pollution from Boston's largest buildings, which account for 40% of the city's carbon emissions.
- **Building owners subject to BERDO are required to report their buildings' annual energy and water consumption as well as comply with building emissions standards.**
- These emissions standards decrease over time, with all BERDO buildings expected to reach net-zero emissions by 2050.

WHO IS COVERED BY BERDO?

- Residential buildings that have 15 or more units
- Non-residential buildings that are 20,000 square feet or larger
- Any tax parcel with multiple buildings that sum to at least 20,000 square feet or 15 units

WHAT ARE YOU REQUIRED TO DO UNDER BERDO?



Report your building's annual energy and water use every year by May 15.



Verify reported data with a third-party qualified energy professional every verification year (in most cases: 2026, 2031, 2036, 2041, 2046, 2051).



Reduce emissions produced by your building(s) to comply with annual emissions limits.

BERDO BASICS *continued*

WHAT ARE THE BENEFITS OF BERDO?

- ✓ Energy efficiency (lower energy bills)
- ✓ Improved indoor air quality
- ✓ Reduced outdoor air pollution
- ✓ Climate change mitigation
- ✓ Green jobs creation
- ✓ Local environmental justice

WHAT ARE EMISSIONS STANDARDS?



Whenever you turn on an appliance or light in your home, you use energy. Depending on what your equipment runs on—electricity, natural gas, steam, fuel oil, etc.—that energy use creates emissions. Emissions are harmful gases that contribute to climate change and air pollution, negatively affecting public health.



BERDO was designed to address this issue by limiting the amount of emissions each building can produce by setting decreasing Emissions Standards every 5 years until 2050.



Reporting your energy data every year allows the City of Boston team to calculate the amount of emissions your building has produced and project your future emissions to enable long-term planning.



➔ **Learn more:** [BERDO 101](#)



WHERE DOES YOUR BUILDING STAND?

To get started, follow the steps in this table.

ASSESS YOUR BUILDING CHECKLIST 			
STEP	Check if your building is subject to BERDO and find your BERDO ID	Report your building's energy use	Check your building's BERDO compliance status
ACTION	☐ Look up your address on the Covered Buildings List to confirm that your building is subject to BERDO ☐ Get your BERDO ID and Parcel ID and log it in the table below	☐ Complete the BERDO Reporting Form ☐ Report Data through Energy Star Portfolio Manager (ESPM) ☐ Submit your completed report by May 15 every year ☐ Hire a third-party verifier ahead of May 15 each verification year (2026, 2031, 2036, 2041, 2046, 2051)	☐ Visit berdocalculator.touchstoneiq.com ☐ Enter your six-digit BERDO ID in the search field on the left side of the page. <i>The column Under or Over Emission Limit (kgCO₂e/yr) tells you if your building is projected to be in or out of compliance for a given year.</i>
RESOURCES	• boston.gov/berdo • If you need help confirming, you can contact energyreporting@boston.gov	• BERDO Reporting How-to Guide available at boston.gov/berdo • BERDO Reporting Checklist	• How to Use the BERDO Emissions Calculator available at boston.gov/berdo

Use this table to store your building's basic BERDO information for your reference.

REPORTING CREDENTIALS LOG 	
BUILDING ADDRESS:	
BERDO ID:	
PARCEL ID:	
ESPM LOGIN:	PASSWORD:
BERDO REPORTING FORM LOGIN:	PASSWORD:

WHERE DOES YOUR BUILDING STAND? *continued*

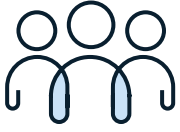
After using the BERDO Emissions Calculator, fill in this log to track your projected compliance status and enter any Alternative Compliance Payments (ACPs) you plan to make any given BERDO compliance year. Compliance options, including ACPs, are discussed in more detail in [Section 2](#).



BERDO COMPLIANCE LOG				
Compliance Period				
2025-2029	2030-2034	2035-2039	2040-2044	2050 and beyond
Compliance Status				
☐ Above limit ☐ Under limit ☐ N/A	☐ Above limit ☐ Under limit	☐ Above limit ☐ Under limit	☐ Above limit ☐ Under limit	☐ Above limit ☐ Under limit
Projected Emission Over the Limit				
<i>(Using the BERDO Emissions Calculator, enter the amount in MTCO_{2e} of emissions your building is over for the 1st year of the compliance period. To convert kilograms to metric ton, simply move the decimal point three spaces to the left.)</i>				
2025-2029	2030-2034	2035-2039	2040-2044	2050 and beyond
Enter Amount	Enter Amount	Enter Amount	Enter Amount	Enter Amount
What Methods Will You Bring Into Compliance?				
☐ Renewable energy ☐ ACPs	☐ Renewable energy ☐ ACPs	☐ Renewable energy ☐ ACPs	☐ Renewable energy ☐ ACPs	☐ Renewable energy ☐ ACPs
Projected ACP Amount for BERDO Compliance Year				
<i>(Enter the ACPs for the first year of the compliance period. ACPs are paid annually)</i>				
2025-2029	2030-2034	2035-2039	2040-2044	2050 and beyond
Enter Amount	Enter Amount	Enter Amount	Enter Amount	Enter Amount



COMMUNICATE WITH YOUR ASSOCIATION AND UNIT OWNERS



Clear and consistent communication with your association and unit owners is an important piece of planning for BERDO compliance. Under BERDO, the condo association or co-op corporation are responsible for the compliance. In condos, owners own their units. In co-ops, unit owners own shares in the building. In both cases, a board or association manages the common areas and building systems. BERDO compliance may require upgrades in individual units and shared spaces. Condo associations and co-op boards must decide who is responsible for meeting BERDO requirements and managing any needed improvements.

Keep unit owners informed by implementing a communication strategy. Share information through accessible channels such as:



Emails



Printed communications
and annual meeting reports



Newsletters



Resident text group chat



In-person communications,
such as town halls and
unit owner meetings



Resident website/portal

COMMUNICATION TIPS:

- **Designate a main point of contact:** Identify an individual or create a shared email account to be the main source of communication for all information, questions, and concerns related to BERDO.
- **Be clear and accessible:** Make sure all written communication is easy to read and understand, and shared where owners can access it.
- **Create two-way communication channels:** Provide simple ways for owners and tenants to contact the board with questions or concerns.
- **Stay organized:** Keep records of BERDO compliance and decarbonization plans so information is not lost when board or staff change. Consider creating a shared drive on a virtual platform of your choice to file your documents.
- **Review and improve:** Regularly assess and update the communication plan using website or email activity, surveys, and resident feedback.

COMMUNICATE WITH YOUR ASSOCIATION AND UNIT OWNERS *continued*

The table below shows key board actions, unit owner updates, and available tools and resources. Boards can use the templates to explain BERDO, share compliance status, and outline next steps to meet requirements.

BOARD ACTION AND COMMUNICATION PLANNER 		
Items Requiring Action from the Board	Key Messaging Topics Link to templates here	Tools and Communication Templates to Use
Discuss BERDO with fellow owners	☐ Overview of BERDO requirements ☐ Benefits of energy efficiency and electrification ☐ Who to contact regarding compliance and building projects	• BERDO 101 • Template: Basic BERDO information for residents 
Submit the building's annual energy and water report to BERDO by May 15 , either directly or by hiring a third party to complete the reporting	☐ Disclosure of consultants engaged and any communication with the City	• BERDO Reporting How-to Guide • Template: BERDO compliance support update  • Template: Consultant/vendor selection update 
Hire a third-party verifier to make sure reported data is accurate for the 2026, 2031, 2036, 2041, 2046, 2051 reporting years	☐ Disclosure of consultants engaged and any communication with the City	• Find a third-party verifier (responses to request for information) • Template: BERDO compliance support update  • Template: Consultant/vendor selection update 
Confirm if the building is in compliance with BERDO's annual reporting and emission requirements	☐ The building's projected compliance status ☐ Summary of BERDO performance over time, and how it relates to capital projects and HOA reserves	• BERDO Emissions Calculator • Template: Projected BERDO compliance update 
Consider emissions compliance options on behalf of the building	☐ Overview of compliance options the board is considering or implementing ☐ How compliance options will be financed ☐ BCCE Green 100 sign-up information ☐ Alternative Compliance Payments ☐ Project scopes & timelines, details of expected disruptions	• Emissions Compliance Guide • Flexibility Measures • Template: BERDO compliance options and financing approach update  • Template: Renewable energy enrollment request (BCCE Green 100)  • See Section 2: BERDO Emissions Compliance Pathways



SECTION

1

UNDERSTAND BERDO AND HOW TO WORK WITH YOUR ASSOCIATION RECAP

By the end of this section, you should have:

- ☐ Learned the basics of BERDO and how it applies to condos and co-ops
- ☐ Identified your building's compliance timeline and current status
- ☐ Discussed how your board will organize and manage compliance efforts
- ☐ Started developing a communication plan between the board and unit owners on compliance efforts



Photo by Kelsey Colpitts

**SECTION
2**

EVALUATE YOUR BERDO EMISSIONS COMPLIANCE OPTIONS

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OVERVIEW

Buildings subject to BERDO, including condominiums and co-ops, must keep their emissions below the annual emissions limit set for their building type. To do this, most buildings will use a mix of compliance options, depending on factors like building condition and financial flexibility. While the condo association or co-op board is responsible for overall compliance with BERDO, some actions that support compliance fall to the board and others may fall to individual unit owners or shareholders.

This section outlines the main compliance options under BERDO, how they work, and how to begin identifying the most appropriate path for your building.

WHAT ARE THE COMPLIANCE MECHANISMS?



Compliance mechanisms under BERDO are options you have to keep your building's emissions within allowed limits. Associations can combine these approaches in a way that fits their building's needs.



REDUCE DIRECT BUILDING EMISSIONS

You can lower your building's energy use by making energy improvements.



OBTAIN RENEWABLE ENERGY

You can get renewable energy in a few ways, such as enrolling your electric account(s) in BCCE's Green 100 plan, installing rooftop solar panels, joining a community solar project in Boston, and buying MA Class 1 Renewable Energy Certificates (RECs). Renewable energy can only be used to reduce emissions from electricity.



APPLY FOR FLEXIBILITY MEASURES

Flexibility measures are options to adjust your building's emissions limits and/or emissions reduction timeline. Most flexibility measures require an application and approval from the BERDO Review Board.



MAKE AN ALTERNATIVE COMPLIANCE PAYMENT (ACP)

You can make payments of \$234 for each metric ton of CO₂e your building is over its annual emissions limit. These funds support building decarbonization projects that prioritize benefits to Environmental Justice communities in Boston.

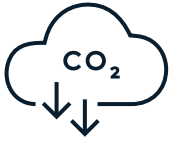
WHAT ARE THE COMPLIANCE MECHANISMS? *continued***COMPLIANCE MECHANISMS TYPICALLY MANAGED BY THE BOARD VS. UNIT OWNERS**

The table below shows common ways each party can help bring the building into compliance. This is not a complete list. Each association should check its bylaws to see how responsibilities are divided. Review the [BERDO Condo Handbook](#) for more detail on how to determine responsibility between unit owners/shareholders and the association.

Compliance Options	The Board	Tools
Reduce Direct Building Emissions 	- Identify potential energy-saving and electrification projects in common areas and allocate the budget accordingly. - Hire professionals to scope and execute projects.	Replace in-unit equipment (e.g., washers/dryers, HVAC units, stoves) with energy-efficient, electric models at the end of their useful life.
Obtain Renewable Energy 	Procure renewable energy (e.g., RECs or solar) on behalf of the building and/or enroll common-area meters in the BCCE Green 100 program.	- Enroll unit's electric accounts into the BCCE Green 100 program - If your unit has exclusive roof rights, explore solar.
Apply for Flexibility Measures 	Evaluate which flexibility measure to pursue and submit an application on behalf of the association.	Support the application process by volunteering to submit an application for the building, vote on the board's decision, or provide information, depending on the condo/coop bylaws
Make an Alternative Compliance Payment (ACP) 	Evaluate the cost of ACP compared to retrofits and/or renewable energy and submit payment to the City if appropriate	- Engage in Association's budgeting process. - A vote may be required, depending on the condo/coop bylaws.



REDUCE DIRECT BUILDING EMISSIONS



SHORT AND LONG-TERM PLANNING

Based on your building's condition, system age, and available capital budget, you can decide which energy-saving measures can be implemented right away and which should be planned over time. The section below separates short-term actions from longer-term projects. If you are already considering building improvements, jump to the [next section](#) on pg. 23 to get started with your first steps.

SHORT-TERM ACTIONS

You can save energy in the near-term by:

- ✓ Upgrading to energy efficient lighting and appliances
- ✓ Improving building system controls
- ✓ Weatherstripping and air sealing the building

LONG-TERM ACTIONS

Larger upgrades typically need more financial and technical planning. Some can be tied to equipment replacements or timed together for best results:

- ✓ Improving building envelope improvements, including windows
- ✓ Electrifying heating system and installing heat pumps
- ✓ Upgrading water boiler
- ✓ Upgrading major appliances
- ✓ Upgrading electrical service and panel (if needed)
- ✓ Repairing and insulating roof and installing solar (if feasible)



➔ **Learn more:** This [quick guide](#) helps illustrate what BERDO compliance planning may look like over time.

PURCHASE RENEWABLE ENERGY



Under BERDO, renewable energy can be used to reduce emissions from electricity only, not from fuels like natural gas or fuel oil. Descriptions of each option are included below. Be sure to confirm the eligibility of any renewable energy purchase prior to signing a contract. There are many renewable energy products on the market and not all are BERDO eligible. If you have questions about eligibility, reach out to energyreporting@boston.gov.



RENEWABLE ENERGY OPTIONS PLANNER

Renewable Energy Options	When It Is Best To Use	Cost and Payment Frequency	Who Is Involved and How to Use	Which Compliance Period(s)
Boston Community Choice Electricity (BCCE) "Green 100" Plan - The City's BCCE program procures renewable energy on behalf of residents and small businesses at affordable rates. - Electric accounts enrolled in Green 100 for a full calendar year are considered to have zero emissions from their electricity usage.	Before your emissions compliance year	\$ (Low cost) Monthly	The Board can enroll common accounts while Unit Owners can enroll their individual electric accounts via the Opt In/Opt Out Form Template: Renewable energy enrollment request (BCCE Green 100)	☐ 2025-2029 ☐ 2030-2034 ☐ 2035-2039 ☐ 2040-2044 ☐ 2045-2050
MA Class I RECs - A Renewable Energy Certificate (REC) is a record that certifies that renewable energy was produced. - MA Class I RECs only come from renewable sources located in New England that started operating after 1997. BERDO only accepts non-emitting MA Class I RECs, which means the energy must come from sources that do not produce emissions.	During your emissions compliance year or during reporting season	\$\$ (Medium cost) Annual	The Board can buy RECs through the City of Boston's MA Class 1 REC Connector Program at boston.gov/berdo-recs or independently through REC brokers on behalf of the association.	☐ 2025-2029 ☐ 2030-2034 ☐ 2035-2039 ☐ 2040-2044 ☐ 2045-2050
On-site Solar Solar can be installed on your building as "behind-the-meter." Electricity generated will be deducted from electricity bill and from emissions calculations.	1-2 years before your emissions compliance year	\$\$\$ (High cost) Upfront	Depending on who holds the roof rights, the Board or Unit Owners could install solar panels on the building's rooftop.	☐ 2025-2029 ☐ 2030-2034 ☐ 2035-2039 ☐ 2040-2044 ☐ 2045-2050

PURCHASE RENEWABLE ENERGY *continued***RENEWABLE ENERGY OPTIONS PLANNER** *continued*

Renewable Energy Options	When It Is Best To Use	Cost and Payment Frequency	Who Is Involved and How to Use	Which Compliance Period(s)
Solar Net Metering Credits - Net metering credits are bill credits for renewable electricity sent to the grid. Typically net-metering credits used for BERDO are from off-site solar. - New net metering credits must come from renewable energy in Boston to be eligible for use in BERDO.	Before your emissions compliance year	\$ (Low cost) Annual	The Board can enroll common area electric accounts; Unit Owners enroll their own. Options include: joining a community solar project in Boston or receiving net metering credits from solar in Boston.	☐ 2025-2029 ☐ 2030-2034 ☐ 2035-2039 ☐ 2040-2044 ☐ 2045-2050
Virtual PowerPurchase Agreement (VPPA) Condos may be able to sign an agreement to receive RECs from an existing, BERDO-approved Power Purchase Agreement from renewable energy outside of New England.	Before your emissions compliance year	\$ (Low cost) Annual	The Board could sign a retail agreement on behalf of the association to join an approved VPPA from outside of New England.	☐ 2025-2029 ☐ 2030-2034 ☐ 2035-2039 ☐ 2040-2044 ☐ 2045-2050



➤ **Learn more:** Detailed descriptions of listed renewable energy options can be found in our [renewable energy guide](#).



➤ **To speak directly to a BERDO staff member** about renewable energy purchases, you can schedule an appointment [here](#).

HOW TO CALCULATE HOW MUCH RENEWABLE ELECTRICITY YOU NEED

The amount of renewable electricity your building needs depends on how much electricity contributes to your total emissions. You can estimate how much renewable energy you're projected to need for compliance by plugging your last year's energy data into this template:

Emissions Compliance Projections.

FLEXIBILITY MEASURES



Flexibility Measures under BERDO are options that the board can apply for to adjust your building's emissions limits and/or emissions reduction timeline. All flexibility measures have eligibility criteria and most require approval from the BERDO Review Board.

Here's a short description of the four flexibility measures under BERDO:



BLENDING EMISSIONS STANDARD

For mixed-use buildings, emissions limits are adjusted based on the area of each use that accounts for at least 10% of area, energy use, or emissions. For example, if a building is 80% multifamily and 20% retail, the emissions standard would be based on the 80/20 ratio of the building's gross floor area.



BUILDING PORTFOLIO

Combine multiple buildings under one portfolio-wide emissions standard, offering flexibility to reduce emissions across properties instead of individually.



INDIVIDUAL COMPLIANCE SCHEDULE

Customize your emissions reduction timeline based on past performance and building operations, including reductions achieved before 2021.



HARDSHIP COMPLIANCE PLAN

Request adjusted timelines or targets if you can demonstrate qualifying financial or technical challenges.

If you think one or more might apply to you, take a look at our [Flexibility Measures Guide](#) for details on requirements and application deadlines.

FLEXIBILITY MEASURES *continued***WHICH FLEXIBILITY MEASURE MAY BE RIGHT FOR YOUR BUILDING**

Flexibility Measure	When to Consider	When It Is Best To Use	Who Is Involved and How To Use	Planning Resources
Blended Emissions Standard	Your building is mixed-use residential, with non-residential space (e.g. office or retail) accounting for at least 10% of the building's energy use, emissions, or total square footage.	During Annual reporting	Opt into a blended emissions standard in the BERDO Reporting Portal when completing your annual BERDO report.	- Calculate your blended emissions standard here, then compare it to your projected emissions in the BERDO Calculator to assess compliance. How to Opt In
Hardship Compliance Plan	- Meeting emissions limits would create a significant technical or financial hardship. - When compliance is not feasible due to cost or building constraints	Before Your emissions compliance year - By July 1 for long-term - By October 1 for short-term	- Prepare and submit an application to the BERDO Review Board. - BERDO staff will review your application for completeness and the BERDO Review Board will need to vote to approve the application at a public meeting.	Apply here 
Building Portfolio	Your association includes multiple buildings under common ownership.	Before Your emissions compliance year - By September 1	- Prepare and submit an application to the BERDO Review Board. - BERDO staff will review your application for completeness and the BERDO Review Board will need to vote to approve the application at a public meeting.	- Use this worksheet to estimate your portfolio's blended emissions standard. - Apply here 
Individual Compliance Schedule	You can demonstrate a pathway to 50% emissions reduction by 2030 based on past data and planned upgrades.	Before Your emissions compliance year - By September 1	- Prepare and submit an application to the BERDO Review Board. - BERDO staff will review your application for completeness and the BERDO Review Board will need to vote to approve the application at a public meeting.	Apply here 



➤ To speak directly to a BERDO staff member about renewable energy purchases, you can schedule an appointment [here](#).

ALTERNATIVE COMPLIANCE PAYMENTS



Often misunderstood as fines, Alternative Compliance Payments (ACPs) are actually a compliance mechanism under BERDO. A building can make an annual payment of \$234 per metric ton of CO₂e above its emissions limit to come into compliance.

WHERE ACP FUNDS GO

ACPs go into the Equitable Emissions Investment Fund, which invests in building decarbonization projects in Boston's environmental justice communities, which are disproportionately affected by air pollution.

HOW THE BOARD CAN MAKE AN ALTERNATIVE COMPLIANCE PAYMENT

If you're considering making an ACP, refer to the BERDO Emissions Calculator to estimate your projected amount. Once you decide to make an Alternative Compliance Payment to comply with BERDO, request an invoice through the BERDO Reporting Portal. The invoice will be sent by email and mail, with instructions for payment.

If planning on paying ACPs, the Board should inform residents about any changes in fees due to the payments and budget for future compliance years.

SECTION 2

EVALUATE YOUR BERDO EMISSIONS COMPLIANCE OPTIONS RECAP

By the end of this section, you should have:

- ☐ Explored the different compliance pathways available under BERDO
- ☐ Considered opportunities to reduce your building's direct emissions in the near and long term
- ☐ Reviewed renewable energy options and flexibility measures that may help meet compliance
- ☐ Assessed whether Alternative Compliance Payments (ACPs) play a role in your compliance

**SECTION
3**

DEVELOP YOUR BUILDING DECARBONIZATION STRATEGY

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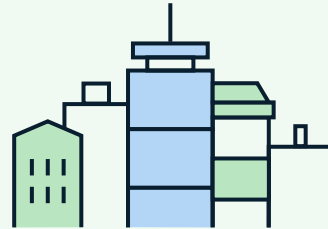
OVERVIEW

This section provides practical tools to help your building map out a clear, phased pathway to BERDO Compliance. It's useful to refer to during board meetings, budget planning, and conversations with consultants.

The goal of decarbonization is to transition to a building to be highly energy efficient, all-electric, and powered by renewable energy. Achieving this goal often takes long-term planning and progress over time.

Planning starts with these key actions:

- 1 Assess your building's current conditions, potential ways to save energy, and needed upgrades
- 2 Review costs and available financing
- 3 Assemble your team
- 4 Apply a phased approach to building decarbonization



ASSESS YOUR BUILDING'S CURRENT CONDITIONS



Planning ahead and coordinating upgrades can help maximize energy savings and reduce overall costs. Whether the board is working with a consultant or their facility personnel, a helpful first step is to evaluate the building's current conditions.

EXISTING BUILDING SYSTEMS

Use the table on the next page to record your building's current conditions. This will help you identify when to replace or upgrade equipment. You may find this information in past building records or reserve studies. An energy auditor can also help gather this information (see "[Consider an Energy Audit](#)" for more).



ASSESS YOUR BUILDING'S CURRENT CONDITIONS *continued*

EXISTING BUILDING SYSTEMS LOG					
Building Element A physical part of the building or its systems that affects energy use, comfort, or performance	Description Material, Model number, system type, brand, warranty, etc.	What's the Current Condition? Good – New or fully functional with minor wear Fair – Aging but still operational Poor – Near end of useful life; unreliable Critical – Failing or unsafe; urgent attention needed	Install Date MM/DD/YY	Last Serviced Date MM/DD/YY	Next Steps? - What changes can be made to save energy now? - When should we upgrade or replace?
Example: Roof	30-year shingle roof	Fair	6/1/2000	6/1/2025	- Add insulation - Replace roof in 2030
Example: Heating System	Steam with central gas boiler	Good	2/1/2012	11/1/2023	2027 – Retrocommissioning 2028 – Add controls and smart valves 2040 – Electrification
Roof	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Windows	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Heating System	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Cooling System	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Domestic Hot Water	Description:	Condition:	Install Date:	Service Date:	Next Steps:

ASSESS YOUR BUILDING'S CURRENT CONDITIONS *continued*

EXISTING BUILDING SYSTEMS LOG					
Building Element A physical part of the building or its systems that affects energy use, comfort, or performance	Description Material, Model number, system type, brand, warranty, etc.	What's the Current Condition? Good – New or fully functional with minor wear Fair – Aging but still operational Poor – Near end of useful life; unreliable Critical – Failing or unsafe; urgent attention needed	Install Date MM/DD/YY	Last Serviced Date MM/DD/YY	Next Steps? - What changes can be made to save energy now? - When should we upgrade or replace?
Lighting	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Electrical	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Ventilation	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Oven/Stoves	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Controls (e.g. thermostats)	Description:	Condition:	Install Date:	Service Date:	Next Steps:
Other Building Element:	Description:	Condition:	Install Date:	Service Date:	Next Steps:

ASSESS YOUR BUILDING'S CURRENT CONDITIONS *continued*

CONSIDER AN ENERGY AUDIT

An energy audit assesses your building's energy use and performance. It can help identify where your building uses the most energy, which upgrades to consider, and how to prioritize them.

BEFORE the audit begins, the board should define the scope of work and prepare to share complete utility bills, energy usage data, and cost data.

A typical energy audit may include:

- A site visit to assess the building and energy systems
- A calculation of Energy Use Intensity, also called EUI
- Recommended energy conservation measures, also called ECMs
- Estimated energy and cost savings from each measure
- Available financial resources, such as Mass Save incentives, loans, or other outside funding

To make the audit more useful, ask the auditor to:

- Include BERDO compliance analysis, including emissions projections and how recommended measures may affect future emissions
- Identify available utility incentives, such as Mass Save incentives
- Provide a summary table with recommended measures, estimated costs, savings, incentives, payback period, and expected useful life
- Explain which measures should happen first and which can be planned for later

AFTER the audit, the building should have a plan for how it can fund and carry out the recommended improvements.

TO GET STARTED

- ✓ Start with a no-cost energy assessment and discover energy-saving opportunities for Condos with Mass Save
- ✓ Determine if a deeper energy audit is right for you: A guide to energy audits

An energy auditor may be one of the professionals your building works with as you plan energy upgrades. See the "Assemble Your Team" section on pg. 34 for more information on potential project roles.

ASSESS YOUR BUILDING'S CURRENT CONDITIONS *continued*



QUESTIONS TO CONSIDER

- ☐ Has the building had an energy audit conducted in the past?
If so, when and what type?:
- ☐ Save any audit reports or documents in a shared folder so records don't get lost.
Location of records:

REVIEW BUILDING OPERATIONS AND MAINTENANCE PRACTICES

How building equipment is maintained and operated affects energy use, emissions, comfort, and how long the equipment lasts. Reviewing these practices can help the board identify low-cost ways to improve efficiency before making larger upgrades.



After reviewing this table, identify which issues can be addressed through routine maintenance, which may require outside support, and which should be considered in future capital planning.

BUILDING OPERATIONS AND MAINTENANCE ASSESSMENT		
Questions to Consider		Notes
Are heating and cooling schedules automated and adjusted by season?	☐ Yes ☐ No	Enter Notes:
Are controls in place to run ventilation systems only when needed?	☐ Yes ☐ No	Enter Notes:
Are thermostats and building controls calibrated and working properly?	☐ Yes ☐ No	Enter Notes:
Is building equipment, including filters, regularly cleaned, inspected, and maintained?	☐ Yes ☐ No	Enter Notes:
Are recurring maintenance or comfort issues reviewed to identify the root cause?	☐ Yes ☐ No	Enter Notes:
Is there a clear process for tenants to report maintenance and comfort issues?	☐ Yes ☐ No	Enter Notes:
Is someone responsible for following up on identified issues?	☐ Yes ☐ No	Enter Notes:

ASSESS YOUR BUILDING'S CURRENT CONDITIONS *continued*



IDENTIFY COMMON AND UNIT OWNER RESPONSIBILITIES

An important question that associations need to answer is who is responsible for undertaking the work? Is it the board or the individual unit owners?

Determining who is responsible for modifying and/or upgrading the building's components and systems depends largely upon whether or not the work is being performed to a **common element** or the **unit**.

Some scenarios condos and co-ops may run into	Emission reduction measures that can be taken on:	
	Common Element (Board Responsibility)	Unit (Unit Owner Responsibility)
Building envelope improvements needed (roof, windows, walls).	Implement whole-building weatherization, such as adding insulation to exterior walls and roofs, upgrading leaky or poorly insulated windows, and sealing exterior cracks.	- Install weatherstripping on windows and doors to prevent drafts. - Install blinds on windows with direct sun exposure to help maintain comfortable indoor temperatures in the summer.
Equipment is new or in the mid-stage of its service life.	- Perform routine maintenance on common systems to optimize energy efficiency and performance. - Recalibrate or install centralized equipment controls to reduce energy use. - Evaluate electrical service needs for future electrification.	- Install ENERGY STAR® certified smart and programmable thermostats. - Maintain and service in-unit systems and equipment - Evaluate electrical panel and service for future electrification of in-unit equipment and appliances.
There is equipment that is reaching its end of service life and needs to be replaced.	Coordinate and implement upgrades involving modifications to common areas or shared facilities.	Replace in-unit gas equipment, such as gas stoves, ovens, dryers, HVAC systems, and water heating equipment, with heat pump technology or otherwise ENERGY STAR® certified electric equipment.



REVIEW COSTS AND AVAILABLE FINANCING



Use this section to organize the building's financial information, evaluate upcoming capital needs, and identify practical next steps that reflect the building's budget, affordability concerns, and long-term priorities. As you review this section, focus on these key planning actions:

- ✓ **Plan early.** Early planning gives the building more flexibility, creates time to explore incentives and financing, and can reduce the risk of emergency spending or large special assessments later.
- ✓ **Align capital planning with BERDO compliance.** Many building improvements the board may already need to plan for, such as heating system replacements, electrical upgrades, insulation, and building envelope improvements, can also reduce energy use, lower emissions, and support BERDO compliance.
- ✓ **Budget and phase projects over time.** Budgeting and phasing help boards spread costs across multiple years, align projects with reserve planning, and reduce financial strain on residents.

1

ASSESS YOUR BUILDING'S FINANCIAL READINESS

A financial review can help boards:

- Understand the building's financial readiness for future capital projects
- Identify financial risks early
- Plan for upcoming costs and funding needs
- Consider whether upcoming building projects could support BERDO compliance
- Balance building needs, compliance, and resident affordability



REVIEW COSTS AND AVAILABLE FINANCING *continued*

Use this table to review the building's current financial position and identify what may need to be planned, updated, or discussed before moving forward with major building improvements.

BUILDING'S FINANCIAL ASSESSMENT 		
Financial Area	What to Review	Notes/Next Steps
Reserves	Current reserve balance and annual reserve contributions.	Enter Notes/Next Steps:
Reserve Planning	Whether the building has a reserve study and when it was last updated.	Enter Notes/Next Steps:
Debt and Borrowing	Existing loans, debt, and borrowing authority.	Enter Notes/Next Steps:
Capital Needs	Major projects expected in the next 5 to 10 years.	Enter Notes/Next Steps:
BERDO Planning	Whether upcoming capital projects could reduce energy use, lower emissions, and support BERDO compliance.	Enter Notes/Next Steps:
Resident Affordability	Whether residents may have concerns about assessments, fee increases, or project costs.	Enter Notes/Next Steps:

REVIEW COSTS AND AVAILABLE FINANCING *continued***2 UNDERSTAND YOUR CAPITAL PLANNING OPTIONS**

BERDO compliance may require buildings to make investments over time. To manage costs and reduce financial strain on residents, boards may need to use a mix of financing tools, incentives, rebates, and technical support.

Understanding these options can help the board decide how to fund capital projects in a way that is realistic for the building. There are two common types of resources:

A Direct financing options:

Tools that help buildings borrow money or pay for capital projects over time. These are often used for larger projects, such as heating system replacements, electrical upgrades, or renewable energy installations.

Examples may include: association loans, lines of credit, special assessments, reserve funds, clean energy financing, Mass Save Heat Loan.

B Incentives, rebates, and technical support programs:

Programs that help lower project costs, reduce the amount the building may need to borrow, or reduce the need for large special assessments.

Mass Save incentive programs can provide incentives for air sealing and insulation, heat pumps, programmable thermostats, and other energy saving measures.



➔ **View the guide:** [Financing Document](#)

3 CAPITAL STACKING FOR YOUR DECARBONIZATION EFFORTS

Many buildings may use a combination of funding sources to pay for capital projects. This is often called **capital stacking**, which means combining resources, such as reserves, incentives, loans, or grants, to reduce financial strain.

Capital stacking is most effective when buildings:

- ✓ Start planning early
- ✓ Coordinate upgrades with planned capital projects
- ✓ Pursue incentives before borrowing
- ✓ Phase projects over multiple years, when possible
- ✓ Use technical studies or reserve planning to guide decision-making

As boards review upcoming capital projects, you should also consider whether those projects could reduce energy use, lower emissions, or support BERDO compliance.

REVIEW COSTS AND AVAILABLE FINANCING *continued***SUGGESTED FUNDING ORDER**

When planning how to pay for a project, consider funding sources in this order.

SUGGESTED SEQUENCE		
STEP 1	• Review existing utility data, past audits, equipment age, maintenance records, capital plans, reserve information, and any available BERDO compliance information. • If needed and financially feasible, consider an energy audit, emissions baseline, equipment lifecycle review, or reserve study.	
		FUNDING SOURCES
STEP 2	Look for resources that can reduce the amount the building needs to pay or borrow.	Incentives, rebates, and grants
STEP 3	Review available reserve funds, capital budgets, or deferred maintenance funds.	Internal capital
STEP 4	Consider green bank financing, energy efficiency loans, affordable housing funds, or other lower-cost options.	Low-cost financing
STEP 5	Consider commercial loans, bridge financing, or other private borrowing if additional funding is needed.	Private borrowing

Use the Capital Stacking Worksheet to help your building explore how multiple funding sources—such as reserves, loans, and incentives—can be combined to support larger or more expensive building upgrades.



➔ **View the guide:** [Capital Stacking Worksheet](#)



ASSEMBLE YOUR TEAM

INTERNAL COMMITTEE

Creating a BERDO committee can help the board stay organized, assign responsibilities, and keep the planning process moving. In addition to board members, consider inviting residents with relevant experience in finance, energy, architecture, engineering, building operations, or communications.

Use the table below to identify committee members and assign roles. Depending on the size of the committee, one person may hold more than one role.

INTERNAL COMMITTEE ROLES AND RESPONSIBILITIES 		
Role	Responsibilities	Committee Member Name(s)
Committee Chair	- Organize and lead committee meetings. - Track next steps and help keep the planning process moving.	Enter Name(s):
BERDO Reporting Lead	- Review BERDO compliance status each year. - Lead the reporting process or manage coordination with a third-party consultant.	Enter Name(s):
Finance Coordinator	- Support the financial review and capital planning process with the board treasurer. - Help review funding options and project costs.	Enter Name(s):
Vendor Coordinator	Help solicit contractor bids, compare proposals, and coordinate with selected vendors.	Enter Name(s):
Communication Coordinator	Lead the communications plan and updates with residents.	Enter Name(s):
Other:	Enter Responsibilities:	Enter Name(s):

ASSEMBLE YOUR TEAM *continued*

HIRING THE RIGHT VENDORS

In addition to an internal committee, the building may need to hire outside professionals to support planning, financing, design, or construction. The professionals needed will depend on the project's size, complexity, and whether the work is led by the board, the association, or individual unit owners.

Below are examples of professionals the building may work with during the process.

ROLE	RESPONSIBILITIES	PHASE INVOLVED
Sustainability Consultant or Energy Engineer  Tip: Start with a <u>no-cost energy assessment through Mass Save</u>	• Provide an energy audit • Recommend energy efficiency projects • Support researching and recommending financing solutions	• Planning • Financing • Design • Monitoring
Trade Specialists or Contractors	• Implement building upgrades, such as installing equipment	• Project Implementation • Equipment installation
Property Manager, Accountant, or Capital Planning Consultant	• Help the board review budgets, reserves, borrowing options, and funding strategies for capital projects	• Planning • Financing

Identifying and hiring the right professionals is an essential part of the board's responsibilities. Without it, there is increased risk of low-quality work, poor communication, and resident inconvenience.

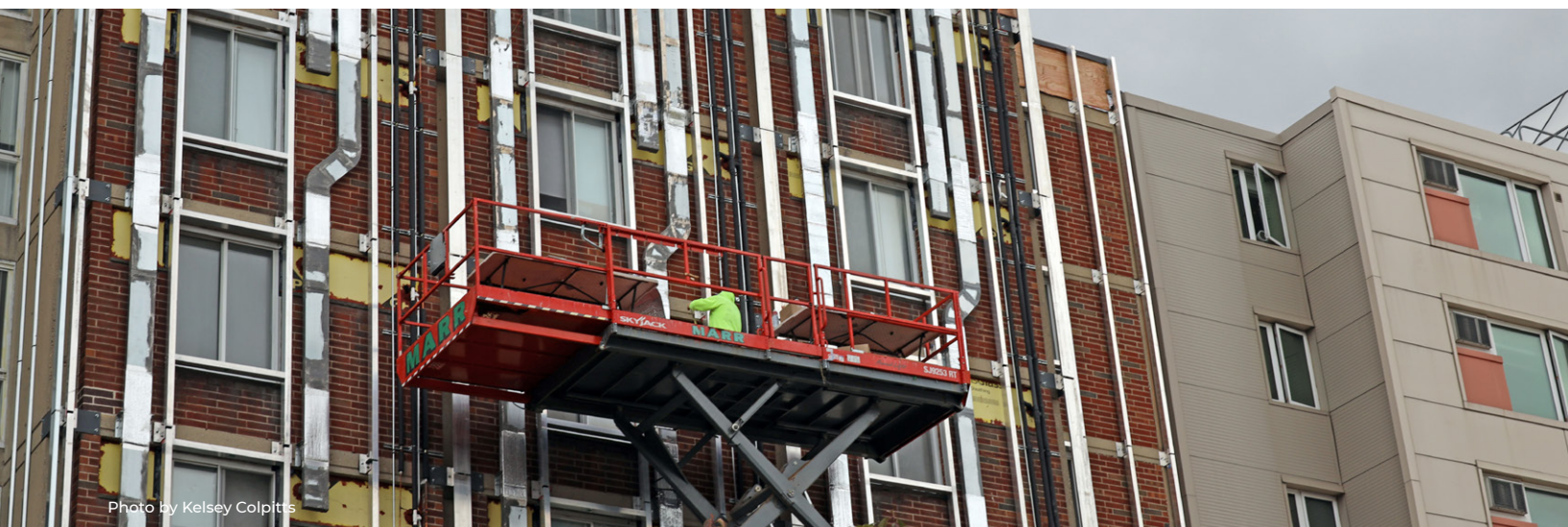


Photo by Kelsey Colpitts

ASSEMBLE YOUR TEAM *continued*

Use the table below to organize the vendor hiring process, from developing the scope of work to communicating with residents.

VENDOR HIRING PROCESS CHECKLIST 	
Tasks	Resources and Tips
☐ Develop a scope of work (SOW) clearly defining what, how, and when work will be done Define project tasks and deliverables	Building Innovation Hub Commissioning/Retro-Commissioning Scope of Work Building Innovation Hub Third-Party Benchmarking Data Verifier Scope of Work Building Innovation Hub Energy Audit Scope of Work
☐ Research and identify contractors and consultants - Search for vendors with relevant expertise - Check online reviews and verify credentials	Mass Save Find a Contractor MassCEC Find a Contractor City of Boston Certified Business Directory BERDO Vendor lists
☐ Develop a request for proposal (RFP) outlining the project, submission requirements, and qualifications - Define vendor qualifications and evaluation criteria - Disseminate RFP for response	 Tip: Ask for references from past projects
☐ Evaluate bids and select vendor Review bids according to evaluation criteria	 Tip: Review three qualified bids for a project before selecting a vendor
☐ Communicate with residents Share updates according to your communications plan (See pg. 10)	Template: BERDO compliance support update  Template: Consultant/vendor selection update 



Learn more: Review [common roles and responsibilities](#) for planning, financing, and carrying out building improvements.

APPLY A PHASED APPROACH TO BUILDING DECARBONIZATION



A building decarbonization plan often uses a Zero-Over-Time (ZOT) approach. This means your building makes changes step by step instead of all at once. The ZOT approach encourages a long-term horizon for reducing emissions, supporting BERDO compliance, and coordinating building improvements over time. The plan helps your building:

- ✓ **Reduce emissions over time** while balancing building operations, resident needs, BERDO timing, and budget considerations
- ✓ **Start with lower-cost improvements** such as operational changes and energy efficiency measures
- ✓ **Plan for larger upgrades** such as electrification, building envelope improvements, and renewable energy options
- ✓ **Align improvements with capital planning** by considering equipment age, replacement timing, and available funding
- ✓ **Stay flexible** as building conditions, technologies, incentives, and BERDO requirements change
- ✓ **Avoid rushed or reactive decisions** by planning for equipment replacement before systems fail

In Section 4, you will use the information gathered throughout this workbook to develop a Zero-Over-Time implementation plan that aligns your BERDO compliance strategy, capital projects, financing approach, and immediate next steps.



➔ **Learn more:** [Zero-over-time \(ZOT\) planning](#)



SECTION
3

DEVELOP YOUR BUILDING DECARBONIZATION STRATEGY RECAP

By the end of this section, you should have:

- ☐ Assessed your building's current conditions, systems, and potential upgrade needs
- ☐ Reviewed your building's financial considerations, funding opportunities, and capital planning needs
- ☐ Identified the people, professionals, and partners needed to support your decarbonization efforts
- ☐ Learn about the Zero-Over-Time approach to building decarbonization

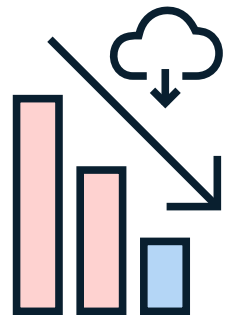


Photo by Kelsey Colpitts

SECTION
4

IMPLEMENT YOUR ZERO-OVER-TIME ACTION PLAN

4A	Common Steps in ZOT Planning	40
4B	Your BERDO Compliance Strategy	42
4C	Your Capital Project Strategy	43
4D	Align Your BERDO and Capital Strategy	44
4E	Identify Immediate Next Steps	45



OVERVIEW

This section helps your building turn ideas, assessments, and learnings into a practical long-term action plan. Using a Zero-over-Time (ZOT) approach, you will organize projects over multiple years, align upgrades with BERDO compliance periods and equipment replacement cycles, identify funding opportunities, and clarify roles and responsibilities. By the end of this section, your building should have a clearer roadmap for managing decarbonization in a phased, financially realistic, coordinated way.

With several ways to comply with BERDO, some options may be easier to use than others. As you review your choices, consider the following questions when deciding what works best for your building:



- *What incentives, rebates, or financing options are available?*
- *How will this affect our property value or marketability?*
- *Will this make our building more comfortable and lead to fewer resident complaints?*
- *How much will this reduce our building's emissions?*
- *Can this be phased, or does it require a full upfront commitment?*
- *What is the long-term return on investment (not just upfront cost)?*
- *Do we have the technical capacity (staff, vendors) to implement and maintain this?*

COMMON STEPS IN ZOT PLANNING



By this point in the workbook, your building should have gathered important information about its current conditions, finances, reserves, potential projects, and project team.

Use the checklist on the next page to organize what you have learned and begin shaping a long-term decarbonization plan.

Every building's ZOT plan will look different based on its size, systems, budget, and resident priorities. However, most buildings will follow a similar planning process.

COMMON STEPS IN ZOT PLANNING *continued*

ZERO-OVER-TIME CHECKLIST		
Common Steps	Checklist	People Involved
 STEP 1 SET YOUR STARTING POINT AND HAVE CLEAR GOALS	☐ LOOK AT YOUR EMISSIONS Use the BERDO Emissions Calculator and refer to the projected emissions in your “ BERDO Compliance Log ” (Section 1 on pg. 9). ☐ COMPLETE AN ENERGY AUDIT: Refer to the “ Assess Your Building's Current Conditions ” (Section 3 on pg. 24) to learn more about energy audits. ☐ ENGAGE STAKEHOLDERS: Refer to “ Communicate With Your Association and Unit Owners ” (Section 1 on pg. 10) and “ Assemble Your Team ” (Section 3 on pg. 34) for communication templates and information on who should be involved. ☐ EXPLORE ALL PATHS: Refer to Section 2 on pg. 14 to understand your compliance options and Section 4 on pg. 42 to log your “ Summary Table of Our BERDO Compliance Strategy .”	• Board • Unit Owner • External Consultant
 STEP 2 IDENTIFY ENERGY IMPROVEMENTS	☐ IMPROVE ENERGY EFFICIENCY: Refer to “ Reduce Direct Building Emissions ” (Section 2 on pg. 17). ☐ PLAN LONG-TERM UPGRADES: Refer to your “ Existing Building Systems ” table (Section 3 on pg. 25).	• Board • External Consultant
 STEP 3 EXPLORE RENEWABLE ENERGY OPTIONS	☐ CHECK YOUR ENERGY NEEDS: Refer to your “ Where Does Your Building Stand ” table (Section 1 on pg. 8) ☐ CHOOSE RENEWABLE OPTIONS: Refer to “ Obtain Renewable Energy ” (Section 2 on pg. 15).	• Board • External Consultant
 STEP 4 FOLLOW THE PLAN AND MONITOR PROGRESS	☐ CREATE A HIGH-LEVEL ZOT PLAN THAT ALIGNS YOUR CAPITAL PLANNING AND DECARBONIZATION STRATEGY: Refer to “ Align Your BERDO and Capital Strategy ” (Section 4 on pg. 44). ☐ TRACK PROGRESS: Report to BERDO annually and track projected compliance. Consult BERDO Compliance Support Staff as needed for help ☐ ADJUST PLAN ACCORDINGLY: Building owners who have completed a virtual building decarbonization consultation with the BERDO Team and are ready to implement building upgrades may be eligible to receive additional free engineering consulting services. This may include designing, reviewing, and providing advice on your existing plan.	• Board • Unit Owner



➔ **Learn more:** [Zero-over-time \(ZOT\) planning](#)

YOUR BERDO COMPLIANCE STRATEGY

Having learned more about building upgrades, renewable energy, flexibility measures, and alternative compliance payments, use the following summary table to kick-start your compliance strategy planning. Refer back to **Section 2** on pg. 14 to complete this summary table.

- ✓ Select check mark under the implementation period if the selected compliance option alone meets compliance requirements.
- + Select plus sign under the implementation period if the selected compliance option must be combined with one or more compliance option(s) to meet compliance requirements.

SUMMARY TABLE OF YOUR BERDO COMPLIANCE STRATEGY			
Compliance Options <i>Check all that apply</i>	Implementation Period	List/Check all the actions that the Board plans to undertake vs. Unit Owners	People Involved
☐ Building Upgrades 	✓ + ☐ ☐ 2025-2029 ☐ ☐ 2030-2034 ☐ ☐ 2035-2039 ☐ ☐ 2040-2044 ☐ ☐ 2045-2050	Board Actions: 	Lead Coordinator(s):
		Unit Owner Actions: 	Lead Coordinator(s):
☐ Renewable Energy 	✓ + ☐ ☐ 2025-2029 ☐ ☐ 2030-2034 ☐ ☐ 2035-2039 ☐ ☐ 2040-2044 ☐ ☐ 2045-2050	BOARD ACTIONS: ☐ BCCE ☐ RECS ☐ SOLAR	Lead Coordinator(s):
		UNIT OWNER ACTIONS: ☐ BCCE	Lead Coordinator(s):
☐ Flexibility Measures 	✓ + ☐ ☐ 2025-2029 ☐ ☐ 2030-2034 ☐ ☐ 2035-2039 ☐ ☐ 2040-2044 ☐ ☐ 2045-2050	BOARD ACTIONS: ☐ Blended Emissions Standard ☐ Hardship Compliance Plan ☐ Building Portfolio ☐ Individual Compliance Schedule	Lead Coordinator(s):
☐ Alternative Compliance Payment 	✓ + ☐ ☐ 2025-2029 ☐ ☐ 2030-2034 ☐ ☐ 2035-2039 ☐ ☐ 2040-2044 ☐ ☐ 2045-2050	BOARD ACTIONS: ☐ Pay Alternative Compliance Payment	Lead Coordinator(s):
		Projected Amount (\$): Year:	

YOUR CAPITAL PROJECT STRATEGY

Refer to your **Existing Building Systems** table on pg. 24 and **Summary of Your BERDO Compliance Strategy** table on pg. 42 to identify upcoming capital projects, possible energy or emissions benefits, and available funding options.

Use this table to organize each project and identify how it may be funded.

CAPITAL PROJECT STRATEGY PLANNER 					
Project/ Improvement	Planned Timing	Estimated Cost	Possible Funding Sources	Dependencies	People Involved
<i>Example: Heating system replacement</i>	<i>May 2027</i>	<i>\$60,000</i>	<i>Incentives, reserves, low-cost financing</i>	<i>Confirm equipment age and available incentives</i>	<i>Board, Property Manager, Contractor</i>
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:
Project:	Date:	Cost:	Funding Sources:	Dependencies:	People:

ALIGN YOUR BERDO AND CAPITAL STRATEGY

Use the following table to connect BERDO compliance planning with long-term capital planning and major building projects over time. This chart synthesizes on a high-level your ZOT plan.



HIGH-LEVEL ZERO-OVER-TIME PLAN			
Implementation Timeline	BERDO Milestones	Planned Building Projects/ Major Expenses	Funding Strategy
		<i>Example: Heating System Replacement</i>	<i>Example: Explore Mass Save incentives and assess reserve funds</i>
2025-2029	Initial compliance period	Building Projects/Major Expenses:	Funding Sources:
2030-2034	Stricter emissions targets	Building Projects/Major Expenses:	Funding Sources:
2035-2039	Additional emissions reductions	Building Projects/Major Expenses:	Funding Sources:
2040-2044	Additional emissions reductions	Building Projects/Major Expenses:	Funding Sources:
2045-2050	Net zero transition	Building Projects/Major Expenses:	Funding Sources:

IDENTIFY IMMEDIATE NEXT STEPS

Having completed critical parts of your long-term ZOT plan, you now have tools to help you effectively guide and communicate with unit owners, board members, and consultants and vendors on your building's BERDO compliance strategy. Use the following tools to help you keep momentum in your planning by laying out some short-term action steps.

NEXT 12-MONTH ACTION PLAN 	
Top Priorities	We Need To:
1. Priority #1:	☐ Hire consultant
	☐ Schedule energy audit
	☐ Review reserve study
	☐ Discuss roles
2. Priority #2:	☐ Explore incentives
	☐ Engage owners
	☐ Other:
	☐ Other:
3. Priority #3:	☐ Other:
	☐ Other:
	☐ Other:
What are the risks involved:	What are our biggest opportunities:
List Risks:	List Opportunities:

SECTION
4

IMPLEMENT YOUR ZERO-OVER-TIME BERDO ACTION PLAN

By the end of this section, you should have:

- ☐ Completed recommended workbook tasks to start a phased Zero-over-Time (ZOT) roadmap that coordinates BERDO compliance milestones, capital projects, and financing strategies over multiple compliance periods
- ☐ Identified and summarized the BERDO compliance options that best fit your building's needs, constraints, and goals
- ☐ Started a long-term capital project strategy that aligns building improvements with equipment replacement cycles, maintenance needs, and decarbonization opportunities
- ☐ Identified immediate next steps, key responsibilities, and priority actions needed to move your building from planning to implementation and compliance success



Building decarbonization is a long-term process, and every condo or co-op will move at a different pace. The goal of this toolkit is to help your board understand the building's current conditions, identify practical opportunities, plan for costs, and make informed decisions over time. By starting early, organizing information, engaging residents, and aligning building improvements with BERDO compliance, your building can reduce emissions, improve comfort, manage costs, and prepare for the future.

FOR FURTHER SUPPORT REACH OUT TO THE BERDO TEAM

Email:

energyreporting@boston.gov

Phone:

617-635-3850 x5

Website:

boston.gov/berdo

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BERDO COMPLIANCE WORKBOOK FOR CONDOS & CO-OPS



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