

SAMPLE / FICTIONAL. 123 Example St is a made-up building; every name, number and ID below is invented to show the format of our drafts. Evergreen Compliance is independent and not affiliated with the WA Department of Commerce. We prepare drafts and administrative support; the building's Qualified Energy Manager (QEM) makes all determinations, attests, signs and submits.

Sample Tier 2 draft package: contents

Oct 9, 2026

This folder shows exactly what a client receives, prepared for a **made-up building**: SAMPLE: Example Street Apartments (fictional), 32,000 sq ft multifamily. Every page is watermarked SAMPLE / FICTIONAL.

#	Document	Format	Who finalizes
01	Portfolio Manager setup checklist + administrative data review	PDF	QEM confirms GFA and data
02	Draft Energy Management Plan on Commerce's EMP template (CBPS 039)	Word + PDF	QEM reviews; owner adopts and signs
03	Draft O&M program: equipment inventory + task schedule in Commerce's O&M Program Development Tool (CBPS 040)	Excel + PDF	QEM reviews; building team implements
04	Form B input packet (owner facts; QEM fields blank)	PDF	QEM determines and enters in Portal
05	Early Adopter Incentive application checklist	PDF	QEM completes application
06	QEM review and submission checklist (CBPS 022/023 items)	PDF	QEM
07	Client data-request checklist	PDF	Owner

Not included in a draft package: Form B/C determinations, EUI calculation, EMP/O&M Reporting Tool attestations, Portal certification or submission, energy audits, site visits, engineering, or legal advice.

Sample Owner LLC (fictional)

[Building photo: SAMPLE - none for fictional building]

SAMPLE: Example Street Apartments (fictional)

Commerce Building ID: SAMPLE-000000 (fictional; real ID comes from the Commerce notification letter / Portal)

123 Example St, Example City, WA 98000 (fictional address)

Energy Management Plan (DRAFT - SAMPLE / FICTIONAL)

Plan adoption date: [Owner to set on adoption - not yet adopted]

Last updated: October 9, 2026 (sample draft v0.1)

Table of Contents

Please reference the [Clean Buildings Performance Standard](#) integrated document for all requirements pertaining to the standard. For more information, visit the official Clean Buildings website at <https://www.commerce.wa.gov/cbps/> or email questions to buildings@commerce.wa.gov.

Building Summary

5.1 An Energy Management Plan has been established and maintained in accordance with the standard.

Building Information

	Building Information
Site Name:	SAMPLE: Example Street Apartments (fictional)

	Building Information
Address:	123 Example St, Example City, WA 98000 (fictional address)
Construction Year:	1988 (fictional)
Facility Description:	Four-story wood-frame multifamily building over a concrete podium with 36 apartments, a leasing office, a community room and a laundry room. Gross floor area 32,000 sq ft excluding parking (fictional; the QEM confirms gross floor area). Apartments have electric baseboard heat; common corridors are served by one rooftop make-up air unit; domestic hot water comes from one central gas-fired water heating boiler with recirculation pumps.
Weekly Operating Hours:	[QEM to determine per CBPS 031 - residential spaces typically operate continuously; owner has provided occupancy and office hours in the data request]

Building Activity Type

Building Activity (QEM to confirm on Form B)	Gross Floor Area (Square Feet)
Multifamily housing [QEM to select activity type from Table 7-1]	[QEM to determine] (owner reports approx. 30,800)
Leasing office / community room [QEM to confirm whether separate activity type applies]	[QEM to determine] (owner reports approx. 1,200)
Total GFA	[QEM to confirm] (owner/assessor: 32,000 sq ft,

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Draft Operations & Maintenance program

Draft v0.1, Oct 9, 2026 (sample)

Building: **SAMPLE: Example Street Apartments (fictional)**. Prepared in the structure of Commerce's **O&M Program Development Tool (CBPS 040, version 2.27.26)**; the filled workbook is 03_DRAFT_OM_Program_Development_Tool_SAMPLE.xlsx. Task text below is Commerce's standard inspection/maintenance task library (ASHRAE Standard 180 based) as embedded in the tool.

C. HVAC equipment inventory (from nameplate photos supplied by the building team)

Equipment Facility ID	Equipment Type	Service Type	Year Installed	Status	Location / notes
EXST-B-1	Hot Water Boiler	Domestic Hot Water	2009	In Service	Gas-fired DHW boiler, mechanical room (fictional)
EXST-P-1	Pump	Domestic Hot Water	2009	In Service	DHW recirculation pump (fictional)
EXST-P-2	Pump	Domestic Hot Water	2018	In Service	DHW recirculation pump, standby (fictional)
EXST-MAU-1	RTU	Supply Air	2006	In Service	Rooftop corridor make-up air unit, gas heat (fictional)
EXST-EF-1	Fan	Exhaust Fan	2006	In Service	Roof exhaust, trash/laundry (fictional)
EXST-EF-2	Fan	Exhaust Fan	2015	In Service	Roof exhaust, corridor toilets (fictional)
EXST-DFS-1	Duct-free Split Unit	Duct-free Split Unit	2019	In Service	Elevator machine room cooling (fictional)

Not in HVAC inventory: in-unit electric baseboard heaters and bath fans (tenant spaces; [QEM to confirm treatment]). Filtering questions in the tool (e.g. economizer, VFD) are answered by the building team and confirmed by the QEM; they remove tasks that do not apply. The tool's auto-generated task sheet (D1) needs Microsoft Excel 365.

D1. HVAC standard task schedule

Equip ID	Std 180 item	Inspection task	Maintenance task	Corrective action	Frequency	Performed by	Authorizing party
EXST-B-1	5-3a	For systems using fuel oil, inspect fuel filter.	Clean, and verify proper operation.	Repair or replace as needed to ensure proper operation.	Monthly	Maint. tech / Example Mechanical	Pat Sample (EM)

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Form B input packet (building details and activity types)

Draft v0.1, Oct 9, 2026 (sample)

Form B is completed **inside the Clean Buildings Portal** (Building Details + Building Activity Type(s)); there is no separate Commerce Form B file. Commerce: "The EUI shall be developed by the qualified energy manager (QEM). A QEM shall calculate the gross floor area, select the applicable activity type, determine the building's operating shift normalization factor, and enter the data in Form B." This packet only organizes owner-supplied facts so the QEM can do that faster.

1. Building details (owner-supplied, for QEM verification)

Portal field	Owner-supplied information (fictional)	Source	QEM
Building name	SAMPLE: Example Street Apartments (fictional)	Owner	Verify
WA Building ID	SAMPLE-000000 (fictional; real ID comes from the Commerce notification letter / Portal)	Notification letter	Verify
Address	123 Example St, Example City, WA 98000 (fictional address)	Owner / assessor	Verify
Owner of record	Sample Owner LLC (fictional)	County assessor	Verify
Gross floor area (excl. parking)	32,000 sq ft per assessor and owner drawings (fictional)	Assessor; drawings p. A-1	QEM TO DETERMINE
ESPM Property ID	0000000 (fictional)	ESPM	Verify

2. Space-use facts for activity type selection (CBPS 018, Table 7-1 / 7-4)

Space (owner description)	Approx. area reported by owner	Weekly hours info supplied	Activity type (Table 7-1)	Activity GFA	Operating shift factor
36 apartments + corridors, stairs, laundry	~30,800 sq ft	Residential, occupied continuously	QEM TO DETERMINE	QEM TO DETERMINE	QEM TO DETERMINE
Leasing office + community room	~1,200 sq ft	Office Mon-Fri 9am-5pm; community room by reservation	QEM TO DETERMINE	QEM TO DETERMINE	QEM TO DETERMINE

Weekly hours guidance: CBPS 031. Also note for the QEM: building permitted before 7/1/2016 (built 1988, fictional), no major remodel since (owner statement).

3. Results (left blank on purpose)

Item	Value
Building EUI (kBtu/sq ft/yr)	QEM TO DETERMINE

Fractional floor areas	QEM TO DETERMINE
Compliance pathway	QEM TO DETERMINE
Form C period and EUI/WNEUI from ESPM	QEM TO DETERMINE

Evergreen Compliance does not calculate the EUI, select activity types, determine shift factors or certify floor area. These fields are deliberately blank.

Sources: Commerce Tier 2 compliance page (step 7), CBPS 016, CBPS 018, CBPS 029, Portal User Guide (Aug 2026). Commerce source files: /workspace/t2/files/templates/SOURCES.md

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QEM review and submission checklist

Prepared Oct 9, 2026 (sample)

Hand-off checklist that goes to the building's QEM with the drafts. Item numbers follow Commerce's EMP Reporting Tool (CBPS 022) and O&M Reporting Tool (CBPS 023). **The QEM decides whether each item is met**; "Draft location" tells the QEM where to look.

1. Our administrative completeness check (done before hand-off)

- ☐ All sections of Commerce's EMP template have content or a marked placeholder for the QEM/owner.
- ☐ Every HVAC item from the nameplate photos appears in the O&M inventory with an ID, type, service type and year.
- ☐ Form B packet fields filled with owner facts; all QEM fields left blank and labelled.
- ☐ Owner names, addresses and IDs match across EMP, O&M tool, ESPM and Portal.
- ☐ Open questions list sent to owner/QEM.

2. EMP items (CBPS 022) - for QEM

Item	Draft location	QEM: met / revise / N/A
5.1 EMP established and maintained	EMP draft, matching section	
5.1.1 Energy manager designated	EMP draft, matching section	
5.1.2.2-5.1.2.4 WNEUI/EUI recorded, annual updates and comparison to target	EMP draft, matching section	
5.1.2.5 Building changes documented	EMP draft, matching section	
5.1.2.6-5.1.2.7 EEMs (if applicable)	EMP draft, matching section	
5.1.2.8 Occupant communication method	EMP draft, matching section	
5.1.2.9 O&M staff training plan	EMP draft, matching section	
5.1.2.10 Capital management plan	EMP draft, matching section	
5.1.2.11 Contact list	EMP draft, matching section	
5.1.2.12-5.1.2.13 Lighting (not required for Tier 2 per template)	EMP draft, matching section	