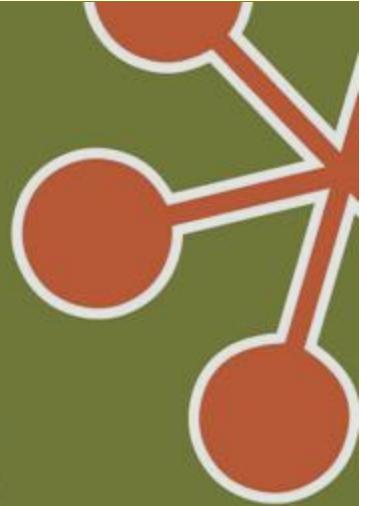


Climate Wise

ENERGY STAR for Buildings and
Portfolio Manager



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Agenda

- ENERGY STAR for Buildings and Climate Wise
- What is Portfolio Manager?
- Who is eligible for a rating?
- How does Portfolio Manager calculate benchmarks?
- How do I use it?
- Applications
- Earning the ENERGY STAR Label



ENERGY STAR For Buildings and Climate Wise

- Satisfy Platinum tier requirement by earning building label:
Demonstrate Superior Sustainability Performance
- Submit documentation through myCW
- Compliments the Greenhouse Gas Baseline Tool



Portfolio Manager and GHG Baseline Tool

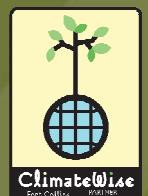
Portfolio Manager

- ENERGY STAR's energy management tool
- Tracks utility data for energy and water
- Provides normalizing and benchmarking
- Greenhouse gas emissions for energy use based on regional factors
- Can copy data into Baseline Tool



Greenhouse Gas Baseline Tool

- Climate Wise tool for basic greenhouse gas inventories
- Includes energy, embodied energy in water, transportation, and solid waste
- Customized emission factors for Fort Collins



Who is eligible for a rating?

- A facilities space must be at least 50% of one of the following and less than 10% “other”
 - Bank/Financial Institution
 - Courthouse
 - Hospital (acute care and children’s)
 - Hotel
 - House of Worship
 - K–12 School
 - Medical Office
 - Municipal Wastewater Treatment Plant
 - Office
 - Residence Hall/Dormitory
 - Retail Store
 - Supermarket
 - Warehouse (refrigerated and non-refrigerated)



What if my building is not eligible?

- Can still use Portfolio Manager to track energy use and costs
- Choose “Other” as your building type
- Track the Energy Use Index or Intensity (EUI)
 - EUI is the energy used per square foot expressed as kBtu/ft²



How do they do that?

- Provides a percentile rank (0-100) of your facility compared to similar ones nationwide
- How do they provide an equitable rating taking into account differences in location and operation?
- Peer group comparison using nationally representative dataset
 - DOE Commercial Building Energy Consumptions Survey (CBECS)
- Source energy consumptions
- Normalize for location & operations using statistical regression analysis
 - Weather
 - Heating degree days and cooling degree days
 - Square footage
 - Hours of operation
 - # of workers, computers, cash registers, refrigeration units, % of space heated and cooled, etc.



How do I use Portfolio Manager?

- Collect input data
 - Electricity and gas data for last 12 months
 - Other variables depending on the building type: # of workers, computers, cash registers, refrigeration units, % of space heated and cooled, etc.
- Go to Portfolio Manager on ENERGY STAR's website
- Create an account
- A detailed animated training is available on the ENERGY STAR website



How do I use Portfolio Manager?

- Log into Portfolio Manager
- Add a Property
- Add a Space
- Add Energy Meters
 - Input 12 months of electricity and gas data
 - Importing features if have large amount of data or many facilities
- Reporting features



Create an account



PORTFOLIO MANAGER

EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

Account Information

Please complete the following information to set up your account in Portfolio Manager.

REQUIRED

*Username:

Your password must be between 8 and 32 characters in length (letters and numbers only; no special characters).

*Enter Password:

*Re-Enter Password:

*First Name:

*Last Name:

*E-mail:

Title:

*Organization:

Address:

City:

State:

ZIP Code:

Country: United States

Phone:

*What is the primary business or service of your organization?

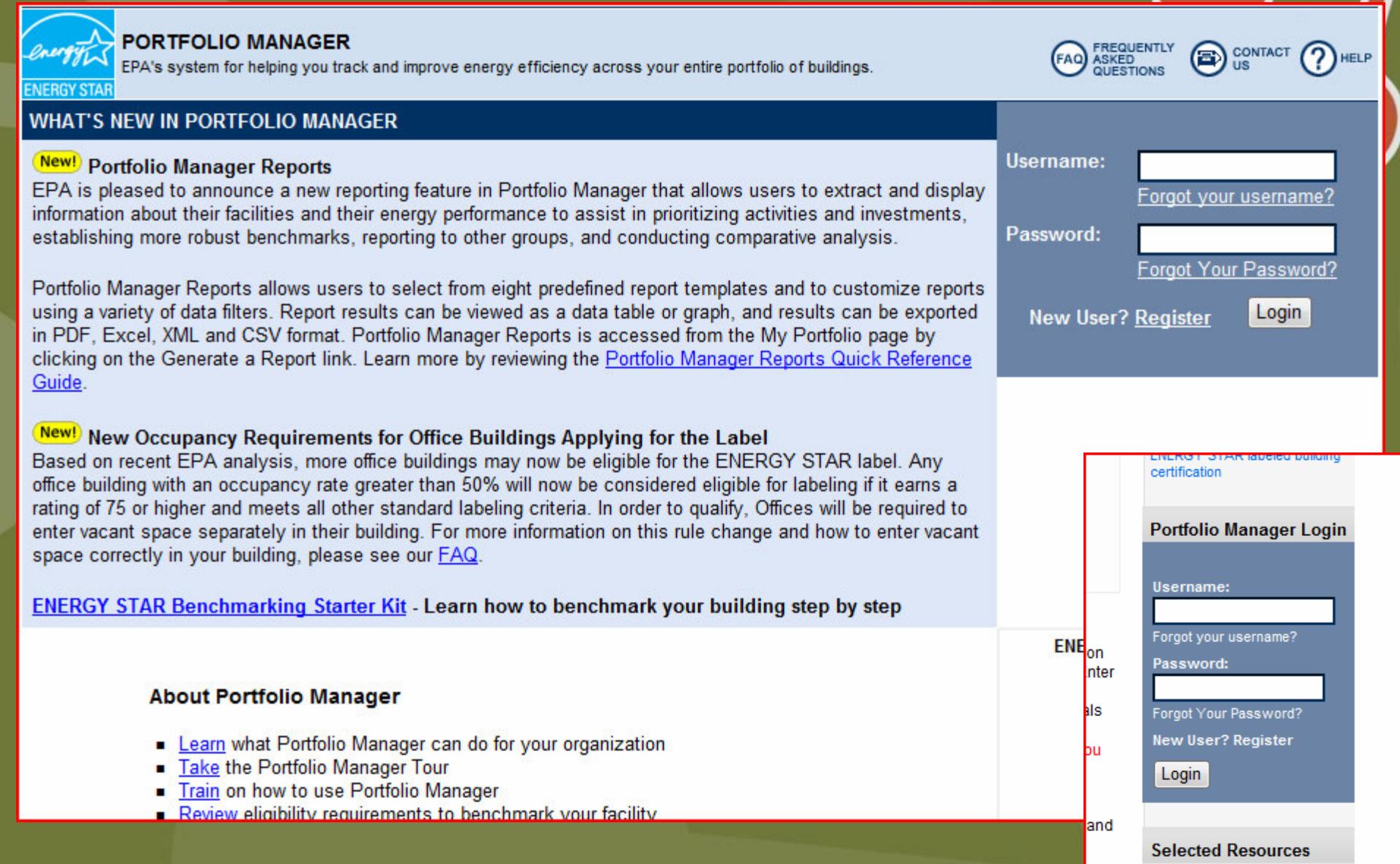
- Banking & Financial
- Builder Developer
- Education
- Federal Government
- Healthcare
- Hospitality
- Local Government
- Manufacturing/Industrial
- Owner/asset management
- Property Management
- Retail
- Service and Product Provider [Learn More](#)
- State Government
- Utilities
- Other (Please specify)

*Which best describes your job title?

- Construction/Project Manager
- Energy Manager
- Energy/Environmental Manager
- Facility Owner/Developer
- Facility/Building/Property Manager
- Leasing Manager/Broker/Agent
- Physical Plant Manager
- Staff Architect/Space Planner/Designer
- Staff Engineer
- VP/Dir. of Construction/Design/Engineer
- VP/Director of Facilities/Agent
- Other (Please specify)



Log into Portfolio Manager



PORTFOLIO MANAGER
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

[FAQ](#) [CONTACT US](#) [HELP](#)

WHAT'S NEW IN PORTFOLIO MANAGER

New! **Portfolio Manager Reports**
EPA is pleased to announce a new reporting feature in Portfolio Manager that allows users to extract and display information about their facilities and their energy performance to assist in prioritizing activities and investments, establishing more robust benchmarks, reporting to other groups, and conducting comparative analysis.

Portfolio Manager Reports allows users to select from eight predefined report templates and to customize reports using a variety of data filters. Report results can be viewed as a data table or graph, and results can be exported in PDF, Excel, XML and CSV format. Portfolio Manager Reports is accessed from the My Portfolio page by clicking on the Generate a Report link. Learn more by reviewing the [Portfolio Manager Reports Quick Reference Guide](#).

New! **New Occupancy Requirements for Office Buildings Applying for the Label**
Based on recent EPA analysis, more office buildings may now be eligible for the ENERGY STAR label. Any office building with an occupancy rate greater than 50% will now be considered eligible for labeling if it earns a rating of 75 or higher and meets all other standard labeling criteria. In order to qualify, Offices will be required to enter vacant space separately in their building. For more information on this rule change and how to enter vacant space correctly in your building, please see our [FAQ](#).

[ENERGY STAR Benchmarking Starter Kit](#) - Learn how to benchmark your building step by step

About Portfolio Manager

- [Learn](#) what Portfolio Manager can do for your organization
- [Take](#) the Portfolio Manager Tour
- [Train](#) on how to use Portfolio Manager
- [Review](#) eligibility requirements to benchmark your facility

Username: [Forgot your username?](#)

Password: [Forgot Your Password?](#)

New User? [Register](#) [Login](#)

ENERGY STAR labeled building certification

Portfolio Manager Login

Username: [Forgot your username?](#)

Password: [Forgot Your Password?](#)

New User? [Register](#) [Login](#)

Selected Resources

Portfolio Manager Home Screen

 **PORTFOLIO MANAGER**

[Home](#) > [My Portfolio](#)

Portfolio Averages	
Baseline Rating: 50 Facilities Included: 52	Current Rating: 50 Facilities Included: 53
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0% Facilities Included: 59	
Averages are weighted by Total Floor Space. More about Baselines More about Change from Baseline: Adjusted Energy Use	
Portfolio Averages (for all Water Utilities and Wastewater Treatment Facilities)	
Baseline Rating: 4 Facilities Included: 2	Current Rating: 4 Facilities Included: 2
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): N/A Facilities Included: 0	
Averages are weighted by Average Daily Flow. More about Wastewater	

[Add a Property](#)
[Import Facility Data Using Templates](#)

Work with Facilities
[Update Multiple Meters](#)
[Share Facilities](#)

Reporting and Analysis
New! [Generate Reports and Graphs](#)
[Request Energy Performance Report](#)

Apply for Recognition
[Apply for the ENERGY STAR](#)
[ENERGY STAR Leaders](#)

Automated Benchmarking
[Get Started Now](#)

You have been granted access to [Shared Facilities!](#)

[My Facilities](#) [My Campuses](#)

GROUP: **All Facilities** [Create Group](#) | [View All](#)

VIEW: **Performance: Rating/Improvement** [Create View](#) | [Edit View](#) | [View All](#)

[Download in Excel](#)

Results 1 - 50 of 62 [Next](#)

Search Facility Name: [Search](#)

All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Facility Name <input type="checkbox"/>	Baseline Energy Period Ending Date	Current Energy Period Ending Date	Baseline Rating (1-100)	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)
--	---------------------------------------	--------------------------------------	-------------------------------	------------------------------	--

Add a Property

Add a Property

Property Type

What kind of property would you like to add?

- A single facility for which my organization owns or manages 90% or more of the floor area.
- A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- A hospital composed of a single facility or collection of facilities.
- A municipal wastewater treatment plant or water treatment and distribution utility
- A campus or other collection of multiple facilities at the same geographic

Add General Facility Information

Use the form below to provide general information concerning your facility.

REQUIRED

*Type of Facility:

- A single facility for which my organization owns or manages 90% or more of the floor area.
- A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- A hospital composed of a single facility or collection of facilities.
- A municipal wastewater treatment plant or water treatment and distribution utility

*Is this facility owned, operated or leased by the Federal government?:

- No
- Yes

Add this facility to a Campus:

Not in Campus

Date facility became part of a campus:
(MM/DD/YYYY)

* Is there an energy efficiency Service and Product Provider assisting with benchmarking this building? Select SPP
If no SPP is managing data for this facility, select "None". If this facility's SPP is not displayed, [Add/Edit Contacts and Organizations](#) to add the facility's SPP to the drop-down menu.



Facility Home Page

 PORTFOLIO MANAGER

ENERGY STAR

Home > My Portfolio > Test 1

Facility Summary: Test 1

[How do I use this page?](#)

Building ID: 1924245

Level of Access: Building Administrator

Electric Distribution Utility: Fort Collins City of ([change](#))

Regional Power Grid: **WECC Rockies**

[Select my Power Generation Plant](#) to calculate my electric emissions rate

Electric Emissions Rate (kgCO₂e/MBtu): 251.6 ([what is this?](#))

Select Electric Distribution Utility

Portfolio Manager uses your electric distribution utility to identify your [regional power grid](#) which provides power consumed in your building. The Zip Code entered for this facility (80524) is serviced by more than one utility.

Please identify your electric distribution utility from the list below:

Select Your Electric Distribution Utility ([What is this?](#))

Electric Distribution Utility	Regional Power Grid
<input checked="" type="radio"/> Fort Collins City of	WECC Rockies
<input type="radio"/> Public Service Co of Colorado	WECC Rockies

General Information [Edit](#)

Address: 220 Remington St , Fort Collins, CO 80524

Year Built: 2000

Property Type: Single Facility

Baseline Rating: **N/A** **Current Rating:** **N/A**

Eligibility for the ENERGY STAR

N/A

Facility Performance [Set Baseline Period](#) | [Set Energy Performance Target](#)

Select View: 7500 Next Millenium

[Create View](#) | [Edit View](#)

12 Months Ending	Baseline Energy Period Ending Date	Current Rating (1-100)	Target Rating (1-100)	Current Site Energy Intensity (kBtu/Sq. Ft.)	Eligibility for the ENERGY STAR
Select Date					
Select Date					
Change					
REFRESH VIEW					

Space Use [Add Space](#)

Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
No Space Defined					

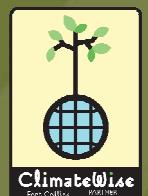
General Facility Administration

[Track](#) Energy Performance Improvements

[Delete](#) this Facility from Portfolio Manager

[Contact us](#)

Sharing Data



Add a Space

Add Office Space: Offices

Please provide values for each required attribute below. Values for optional attributes can also be provided. If the space is a **Temporary Space**, select the "For Temporary Use?" checkbox and provide the actual value. Facilities with temporary values may still apply for the ENERGY STAR.

REQUIRED

Space Name: Offices

*Required for Benchmarking [What is this?](#)

Space Attribute	Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) What is this?	Use Default Value	Units	Effective Date (when this Attribute Value was first true) What is this? (MM/DD/YYYY)
*Gross Floor Area	<input type="text"/> <input type="checkbox"/> For Temporary Use?	N/A	Sq. Ft. <input type="button" value="▼"/>	01/01/2000
*Weekly operating hours	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	Hours	01/01/2000
*Workers on Main Shift	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	01/01/2000
*Number of PCs	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	01/01/2000
*What percent of this space is air-conditioned?	Select <input type="button" value="▼"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	01/01/2000
*What percent of this space is heated?	Select <input type="button" value="▼"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	01/01/2000

Add a Facility Space

This facility must have at least one defined space and all defined space(s) must account for 100% of the facility's area.

- 1) A portion of the facility is unique (e.g., a restaurant within a building predominantly used as an office).
- 2) Usage patterns are unique (e.g., one tenant uses the facility much longer hours than others). Does

Note: If your space is not listed below, please select "Other." You will have an opportunity to further define your space type [about selecting space types](#)

REQUIRED

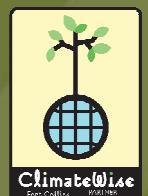
*Enter a Name for this Space: Offices

*Select a Space Type: Office

*Enter the Effective Date (MM/DD/YYYY) for this Space.

The Effective Date is used by Portfolio Manager to determine the starting date for including this Space's attributes in the overall calculation of the facility's energy performance rating:

1/1/2000



Add Energy Meters

Space Use Add Space					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
Offices	Office	10,000	100		Delete Space
Total		10,000	100		

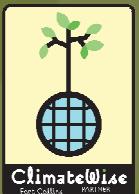
Because more than 50% of your building is Office, your building is designated as Office within Portfolio Manager. This building may be eligible for a rating ([Click to learn more](#)). If you can see a rating for this building, please note that the rating takes into account all of the space types you have listed. If you cannot see a rating for this building, you can be compared to the national average for Office ([Click to learn more](#)).

Due to rounding, the % Floor Area Total may not always equal 100%.

Energy Meters Add Meter Update Multiple Meters View All Meter Data in Excel					
Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts	
No Meter Defined					

Water Meters Add Meter View All Meter Data in Excel					
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts	
No Meter Defined					

Renewable Energy Certificates Add REC							
Provider	Avoided GHG Emissions (MtCO ₂ e)	Generation Facility ID	Generation Facility Name	Period of Generation	Fuel Type	Quantity (MWh)	Action
No Renewable Energy Certificates Defined							



Add Energy Meter

Add Facility Energy Meter: Test 1

To add a meter, enter the name and select the appropriate characteristics for the meter.

If you are entering temporary values for energy data, please indicate so by selecting "Yes" and entering the date range the values will be considered as temporary.

■ REQUIRED

Add Energy Meter

*Enter the Meter Name:

*Apply this meter to the following (check all that apply):

Entire facility
 Offices

Select the Meter Type:

*Energy Type:

*Generation Method:

*Units:

*Add this Meter to Total Facility Energy Use?

Yes, calculate this facility's total energy use by including this meter
 No, adding this meter to this facility's total energy use will inflate the actual value

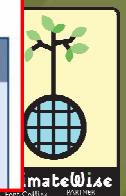
Is this meter currently active?

Yes No

Temporary Energy Data

* Are temporary values being used for energy data? ([what is this?](#))

Yes
 No



Add Energy Meter

Enter Energy Use: Electric

Please enter the energy use for each meter entry below. Portfolio Manager requires meter entries to be consecutive time periods; only one day of overlap or one day of gap between meter entries to be eligible to generate an Energy Performance Rating.

Add Energy Use:

Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (kWh (thousand Watt-hours))	Cost - US Dollars (optional)
01/01/2007	01/31/2007	2900	\$ 181
02/01/2007	02/28/2007	2000	\$ 128
03/01/2007	03/31/2007	1800	\$ 112
04/01/2007	04/30/2007	1800	\$ 111
05/01/2007	05/31/2007	1500	\$ 92
06/01/2007	06/30/2007	1600	\$ 101
07/01/2007	07/31/2007	1950	\$ 132
08/01/2007	08/31/2007	1670	\$ 113
09/01/2007	09/30/2007	1550	\$ 107
10/01/2007	10/31/2007	1760	\$ 119
11/01/2007	11/30/2007	1857	\$ 125
12/01/2007	12/31/2007	2600	\$ 172

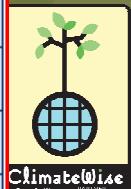
Add Meter Entries: Electric

Please select the number of meter entries to add, enter the start date for these meter entries, and select Continue. If you do not want to add meter entries at this time, select "Do Not Add Meter Entries".

REQUIRED

Select Number of Meter Entries to be added and Start Date for first entry:

Meter Entries to Add	*Start Date (MM/DD/YYYY)	Energy Type	Units
12	Month(s)	Electricity	kWh (thousand Watt-hours)



Reporting

Facility Summary: Test 1

[How do I use this page?](#)

Building ID: 1924245

Level of Access: Building Administrator

Electric Distribution Utility: Fort Collins City of ([change](#))

Regional Power Grid: [WECC Rockies](#)

[Select my Power Generation Plant](#) to calculate my electric emissions rate

Electric Emissions Rate (kgCO₂e/MBtu): 251.6 ([what is this?](#))

General Information [Edit](#)

Address: 220 Remington St , Fort Collins, CO 80524

Year Built: 2000

Property Type: Single Facility

Baseline Rating: 97

Current Rating: 81

Eligibility for the ENERGY STAR

Not Eligible: Current period ending over 120 days

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

Facility Performance [Set Baseline Period](#) | [Set Energy Performance Target](#)

Select View: [Summary: Energy Use](#) [Create View](#) | [Edit View](#)

12 Months Ending	Current Rating (1-100) i	Current Site Energy Intensity (kBtu/Sq. Ft.) i	Current Source Energy Intensity (kBtu/Sq. Ft.) i	Change from Baseline: Energy Use Intensity (kBtu/Sq. Ft.) i	Change from Baseline: Adjusted Energy Use Intensity (kBtu/Sq. Ft.) i	Energy Use Alerts i
December 2007 (Baseline) ▼	97	44.9	83.0	0.0	0.0	Data > 120 days old
December 2008 (Current) ▼	81	93.6	140.0	48.7	58.1	Data > 120 days old
Change	-16	48.7	57.0	N/A	N/A	

Reporting

Quick Reference Guide

Report Template About Report Templates

Select a Report Template

Select a REPORT TEMPLATE to get started

Portfolio Manager Reports

Generate reports and graphs using data from your Portfolio Manager account

QUICK REFERENCE GUIDE

Data Current As Of: October 30, 2009 12:00A

Report Template About Report Templates

Energy Performance

Save as Default Filter for this Report Clear All Filters

0 Matching Facilities 0 Rows Returned

Reporting Period

Single Period (one period)

Comparative (two periods)

Range (all periods within date range)

Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:

Location

U.S. only All Countries

All Locations

Colorado

REFRESH DATA

Energy Performance

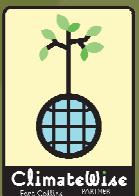
View Data Table View Graph

Don't see what you're expecting in your report?

REFRESH DATA View Full Screen Display Printer-friendly Export Data Set: Excel | XML | CSV | PDF

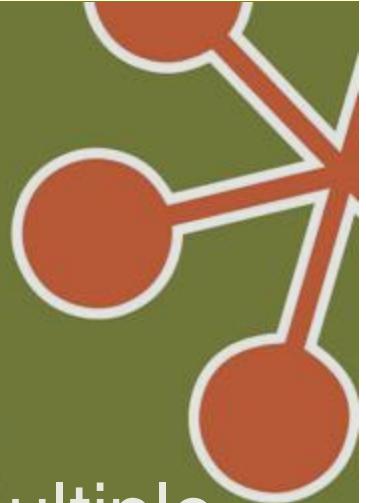
Facility Name	Rating	Period Ending ...	Total Floor Sp...	Site Energy U...	Source Energ...	Annual Energ...	Site EUI
No facilities to display							

Page 1 of 1



Applications

- Used to centralize and track utility data
 - Energy
 - Water
- Prioritizing energy efficiency efforts in multiple buildings
- Greenhouse gas accounting & carbon footprint
 - How this tool complements the Climate Wise Greenhouse Gas Baseline Tool
- Streamline utility reporting for budgeting, management, etc.
- Verify and track energy performance improvements
- Achieving the ENERGY STAR label



ENERGY STAR Label

- Use Portfolio Manager to track utility data for a year
- Achieve a rating score of 75 or higher
- Have a Professional Engineer (PE) verify and validate
 - Statement of Energy Performance (SEP)
 - Data Checklist
- ENERGY STAR is awarded for a specific year
- No cost to apply
- Fees for PE services



Summary

- Earning the label satisfies a Platinum tier requirement
- Good tool for tracking energy and water utility data
- Compliments GHG baseline tool



References and Resources

- ENERGY STAR - www.energystar.gov
- Portfolio Manager www.energystar.gov/index.cfm?c=business.bus_bldgs
- Portfolio Manager Login - www.energystar.gov/istar/pmpam/
- ENERGY STAR Benchmarking Starter Kit -
www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_benchmarking
- Animated Training –
www.energystar.gov/ia/business/benchmarking_training/benchmarking.html
- Apply for ENERGY STAR Label –
www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_intro



Thank you!

