

Energy Star's Portfolio Manager – A Brief Overview

Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment. Whether you own, manage, or hold properties for investment, Portfolio Manager can help you set investment priorities, identify under-performing buildings, verify efficiency improvements, and receive EPA recognition for superior energy performance. Below are some topics that highlight the benefits of utilizing Portfolio Manager tool and will hopefully peak your interest:

I. Manage the Energy and Water Consumption for All Buildings

- a. Portfolio Manager helps you track and assess energy and water consumption within individual buildings as well as across your entire building portfolio. Enter energy consumption and cost data into your Portfolio Manager account to benchmark building energy performance, assess energy management goals over time, and identify strategic opportunities for savings and recognition opportunities. EPA has developed a **Benchmarking Starter Kit** to help you get started quickly. **The link is:** http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_benchmarking
- b. Any building can efficiently track and manage resources through the use of Portfolio Manager. The tool allows you to streamline your portfolio's energy and water data, and track key consumption, performance, and cost information portfolio-wide. For example, you can:
 - i. Track multiple energy and water meters for each facility
 - ii. Customize meter names and key information
 - iii. Benchmark your facilities relative to their past performance
 - iv. View percent improvement in weather-normalized source energy
 1. To understand the difference between source energy and site energy go to the following link: http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_benchmark_comm_bldgs
 - v. Monitor energy and water costs
 - vi. Share your building data with others inside or outside of your organization
 - vii. Enter operating characteristics, tailored to each space use category within your building.

II. Rate Your Building's Energy Performance

- a. For many facilities, you can rate their energy performance on a scale of 1–100 relative to similar buildings nationwide. Your building is *not* compared to the other buildings entered into Portfolio Manager to determine your ENERGY STAR rating. Instead, statistically representative models are used to compare your building against similar buildings from a national survey conducted by the Department of Energy's Energy Information Administration. This national survey, known as the Commercial Building Energy Consumption Survey (CBECS), is conducted every four years, and gathers data on building characteristics and energy use from thousands of buildings across the United States. Your building's peer group of comparison is those buildings in the CBECS survey that have similar building and operating characteristics. A rating of 50 indicates that the building, from an energy consumption standpoint, performs better than 50% of all similar buildings nationwide, while a rating of 75 indicates that the building performs better than 75% of all similar buildings nationwide.
- b. EPA's energy performance rating system, based on source energy, accounts for the impact of weather variations as well as changes in key physical and operating characteristics of each building. Buildings rating 75 or greater may qualify for the ENERGY STAR label.
 - i. To learn more about the energy performance rating system for buildings and how it works go to the following link: http://www.energystar.gov/index.cfm?c=evaluate_performance.pt_neprs_learn
 - ii. To learn more about the ENERGY STAR labeling for building go to the following link: http://www.energystar.gov/index.cfm?c=business.bus_bldgs
- c. Commercial buildings eligible to receive a rating, representing over 50 percent of US commercial floor space, are: **Bank/Financial Institution, Courthouse, Data Center, 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, and Warehouse (refrigerated and non-refrigerated)**
 - i. To learn more about the space type definitions go to the following link: http://www.energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_space_types
- d. EPA is always working to develop rating criteria for additional segments of the commercial building market. For those building that are not eligible to receive a rating, EPA has created a list of reference energy performance targets (**The link is:** http://www.energystar.gov/ia/business/tools_resources/new_bldg_design/2003_CBECSPerformanceTargetsTable.pdf). These are based on average energy use calculated across different types of buildings. These energy performance targets are not

normalized for climate nor adjusted for activities which may affect energy use. All targets are expressed in energy use intensity and are derived from the Commercial Buildings Energy Consumption Survey.

III. Estimate Your Carbon Footprint

- a. Portfolio Manager calculates your building's greenhouse gas emissions (including carbon dioxide, methane, and nitrous oxide) from on-site fuel combustion and purchased electricity and district heating and cooling. Portfolio Manager also enables tracking of avoided emissions from any Renewable Energy Certificates. While the emissions calculations are based on the amount of energy your building consumes, they have no bearing on its energy performance rating. The methodology for calculating greenhouse gas emissions in Portfolio Manager was designed to be consistent with the Greenhouse Gas Protocol developed by the World Resources Institute and World Business Council for Sustainable Development, and is compatible with the accounting, inventory and reporting requirements of EPA's Climate Leaders program, as well as other state and NGO registry and reporting programs.

IV. Set Investment Priorities

- a. Portfolio Manager provides a platform to track energy and water use trends as compared with the costs of these resources. This is a valuable tool for understanding the relative costs associated with a given level of performance, helping you evaluate investment opportunities for a given building and identify the best opportunities across your portfolio.
 - i. The built-in financial tool within Portfolio manager allows you to compare cost savings across buildings in your portfolio while also allowing you to calculate cost savings for a specific project. Being able to quickly and clearly obtain figures showing cumulative investments in facility upgrades or annual energy costs eases decision making for best practice management of your buildings nationwide.

V. Verify and Track Progress of Improvement Projects

- a. You can use Portfolio Manager to generate a Statement of Energy Performance (SEP) for each building, summarizing important energy information and building characteristics such as site and source energy intensity, CO2 emissions, gross floor area, and number of personal computers. The Statement of Energy Performance can help you to:
 - i. Apply for the ENERGY STAR label
 - ii. Satisfy LEED for Existing Buildings (LEED-EB) requirements
 - iii. Support mortgage, sale, and/or lease transactions
 - iv. Document performance in energy service contracts
 - v. Communicate energy performance with tenants/owner/customers

VI. Gain EPA Recognition

- a. You can use Portfolio Manager to share your data with EPA and earn recognition for energy performance within a building or across your entire portfolio. Share best practices, become a Leader for energy improvement, or top energy performance, or simply gain exposure through development of success stories or showcasing a directory of achievements for clients. Recognition opportunities include:
 - i. **ENERGY STAR label** — Recognition for superior energy performance in a single building
 - ii. **ENERGY STAR Leaders** — Recognition for organization-wide improvement or top energy performance
 - iii. **ENERGY STAR Partner of the Year** — Recognition for outstanding contributions to reducing greenhouse gas emissions through energy efficiency

The information contained in this overview was compiled from the Energy Star Website:

http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager