



ENERGY STAR[®] Portfolio Manager

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Region 1 (New England)*

Learn more at energystar.gov



Understanding Portfolio Manager

Performance Rating Systems



Fuel Efficiency Rating: MPG

Is 10 MPG high or low for an automobile?

Common knowledge.



Is 80 kBtu/sf/yr high or low for a building?

Even many building experts don't know.

EPA Energy Performance Rating



Benchmarking



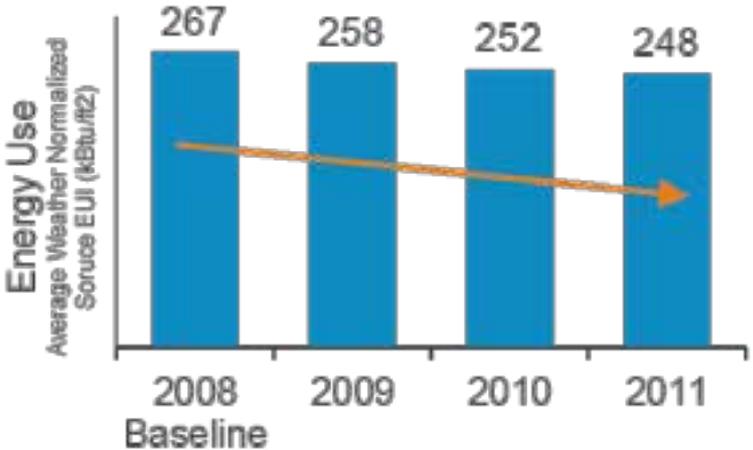
Benchmarking through Portfolio Manager enables you to:

- Compare one building against a national sample of similar buildings
- Compare all of your buildings of a similar type to each other
- Set priorities and targets for the use of limited staff time and/or investment capital
- Track performance over time and gain recognition

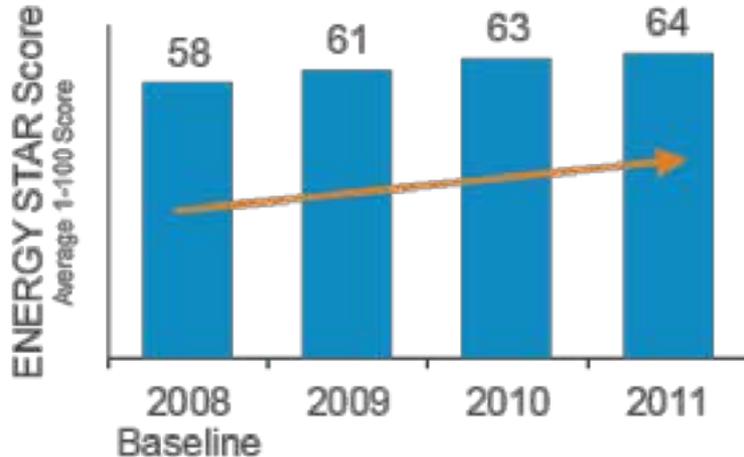
Value of Benchmarking

Consistent benchmarking in buildings results in energy savings and improved performance

Energy Savings in Portfolio Manager



7% Savings



6 point increase

Source: www.energystar.gov/datatrends



ENERGY STAR Score

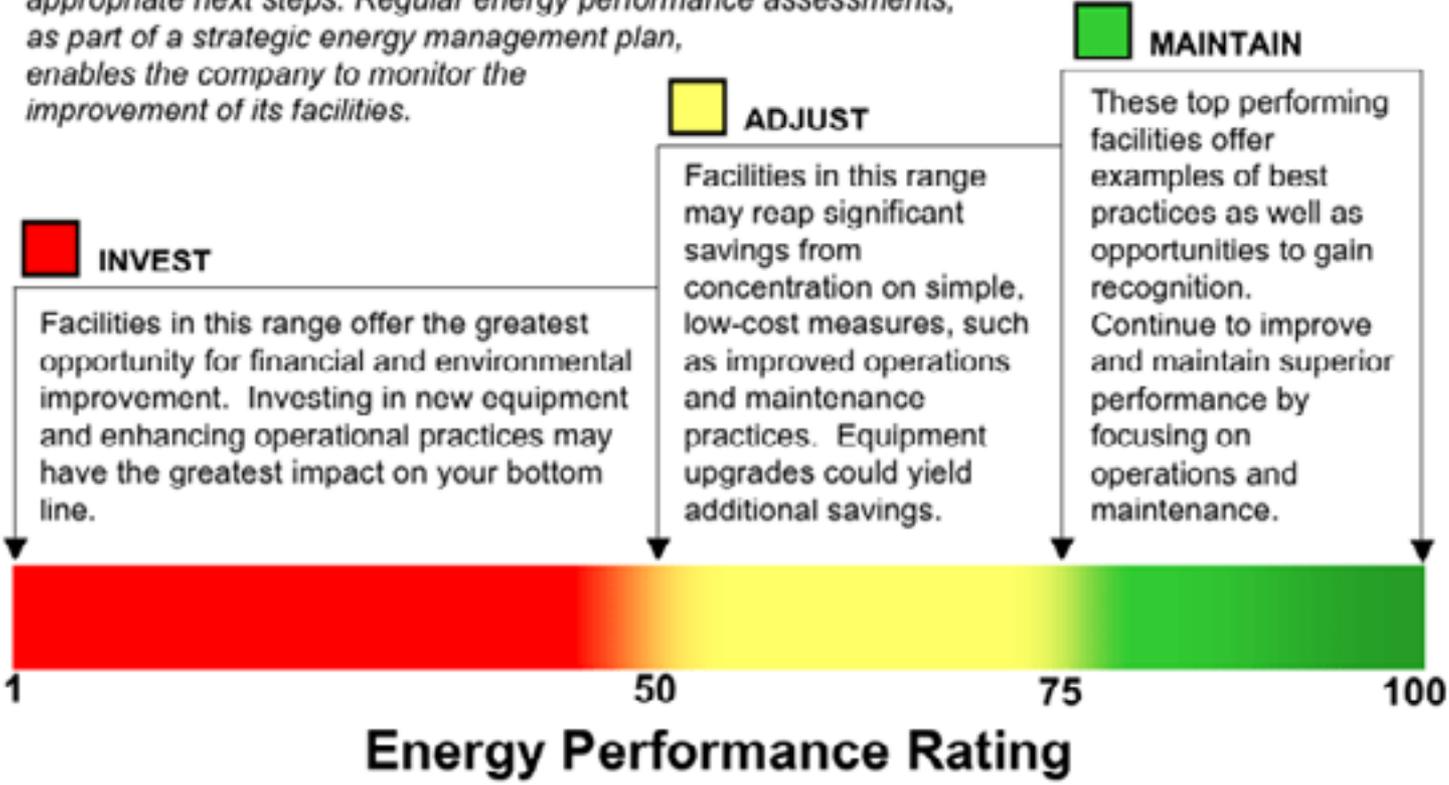
- Bank branch
- Financial office
- K-12 school
- Supermarket/grocery store
- Wholesale club/supercenter
- Hospital (general medical and surgical)
- Medical office
- Senior care community
- Hotel
- Residence hall/dormitory
- Office
- Courthouse
- Wastewater treatment plant
- Worship facility
- Retail store
- Data Center
- Distribution center
- Non-refrigerated warehouse
- Refrigerated warehouse
- Multifamily housing

50 = median energy performance

75+ = top energy performer

Determining a Course of Action

Establish an energy performance baseline for all facilities in the company's portfolio, then set performance goals and create an action plan. The guide below can help determine the appropriate next steps. Regular energy performance assessments, as part of a strategic energy management plan, enables the company to monitor the improvement of its facilities.



Using Portfolio Manager

Gathering data to get started...



- Complete Energy Data
 - 12 full calendar months
 - All fuels
 - All tenant & common areas
- Property Use Details
 - Gross Floor Area
 - Total Number of Residential Living Units
 - Number of units in a low-rise setting
 - Number of units in a mid-rise setting
 - Number of units in a high-rise setting
 - Total Number of Bedrooms
- Zip Code
 - For EPA to retrieve climate/weather details

FUELS (and water)



Gather monthly energy bills (one year/13 months), including:

- Electricity
- Natural gas
- Steam
- Propane
- Liquid propane
- Fuel oil (No. 2),
- Diesel oil (No.2)
- Chilled water
- Wood
- Coal
- Renewables

Going online...how to navigate PM



- Add a property (enter details about it)
- Add building space types
- Enter energy and water consumption data (meter data)
- Generate reports – standard templates or create your own

www.energystar.gov/benchmark

Chrome – IE 11 – Firefox

Navigate the New Portfolio Manager

Five portfolio level tabs



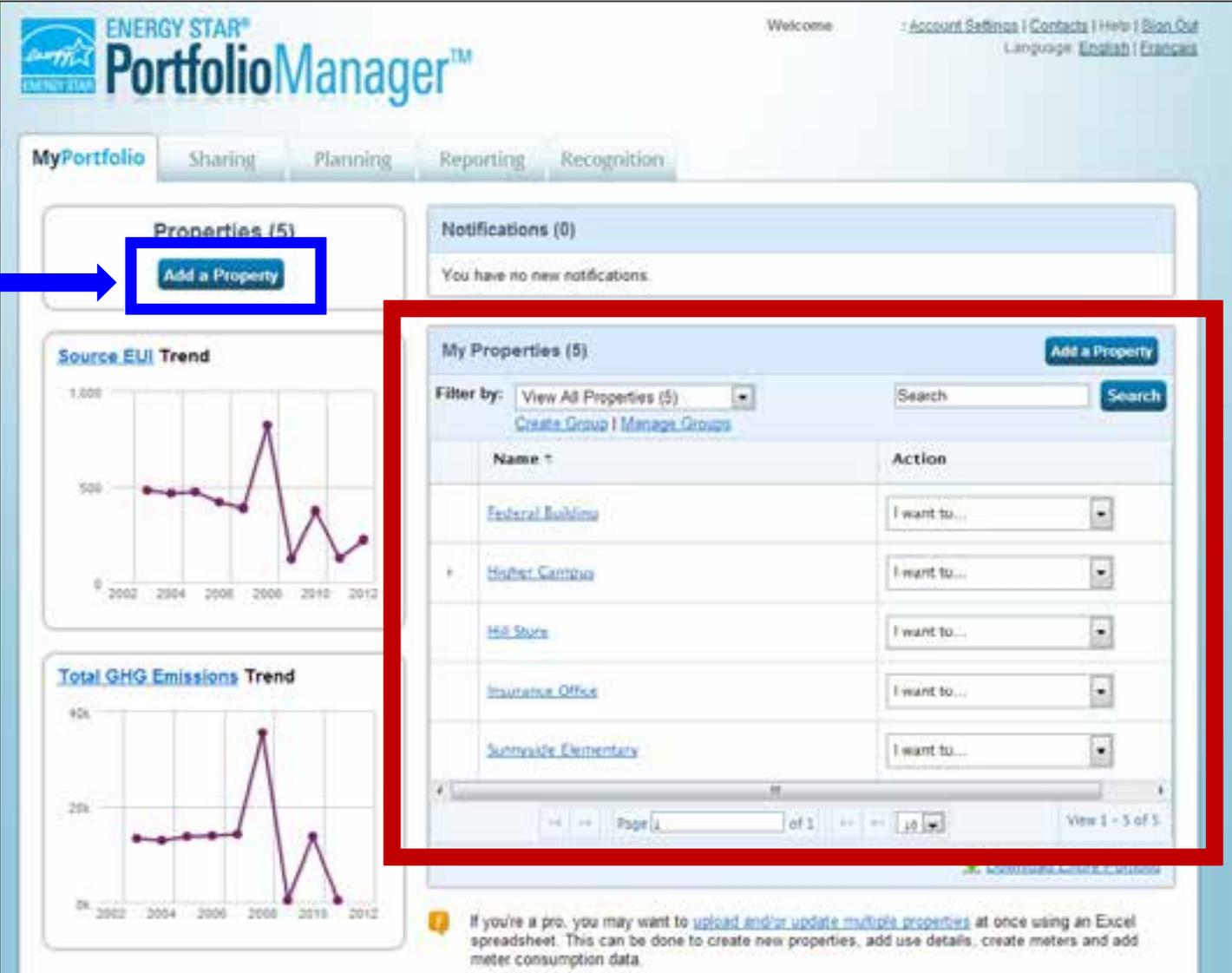
Five property tabs



Intuitive navigation – multiple ways to get to the same place

Your portfolio of buildings

Portfolio level

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there's a navigation bar with 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below this, there are two main sections: 'Properties (5)' and 'Notifications (0)'. The 'Properties (5)' section has an 'Add a Property' button highlighted with a blue box and a blue arrow. Below this are two line graphs: 'Source EUI Trend' and 'Total GHG Emissions Trend'. To the right, there's a 'My Properties (5)' table with a search bar and a table listing properties like 'Federal Building', 'Hooper Cottage', 'Hill Store', 'Insurance Office', and 'Sunrise Elementary'. Each property has an 'Action' column with a dropdown menu. A red box highlights the 'My Properties (5)' section. At the bottom, there's a note about uploading and updating multiple properties using an Excel spreadsheet.

Individual properties

Property level
→



The screenshot shows the ENERGY STAR Portfolio Manager interface for a property named "Insurance Office". The interface includes a navigation menu with tabs for "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition". The property details section shows the address "5201 Blue Lagoon Dr, Arlington, VA 22211", "EXISTING" status, "Portfolio Manager Property ID: 50000003", and "Year Built: 1995 EXISTING". A red arrow points to the "Details" tab in the navigation menu. Two blue arrows point to the "Insurance Office" title and the "EXISTING" status. The "ENERGY STAR Score" section displays a "Current Score: 94" and a "Baseline Score: 83". A "Source EUI Trend" chart shows energy usage from 2002 to 2012. The "Sharing this Property" section shows it is shared with one contact, "Miser_Claire", with "Full Access" permissions.

| Name | Permissions | Action |
|------------------------------|-------------|--------------|
| Miser_Claire | Full Access | I want to... |

Summary Details **Meters** Goals Design

Energy & Water Consumption

[Manage/Enter My Bills](#)

Meters for Performance Metrics

[View/Edit Configuration](#)

Utility & Weather

Electric Distribution Utility (EDU):
NSTAR Electric Co

Regional Power Grid:
New England

Weather Station:
BOSTON/LOGAN INTL (725090)

Your electric distribution utility (EDU) and weather station selections affect the calculation of your energy metrics.

[Edit](#)

Energy Meters (3)

[View as a Diagram](#)

[Add Another Meter](#)

| Name | Energy Type | Most Recent Bill Date | Action |
|----------------------------|------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Retail Elec (acct 111) | Electric - Grid | 12/31/2013 | I want to... I want to... Edit Basic Meter Information View/Add Bills (i.e. meter consumption) Delete Meter |
| Fuel Oil (No. 2) | Fuel Oil (No. 2) | 09/30/2013 | |
| Office Electric (acct 999) | Electric - Grid | 12/31/2013 | I want to... |

Water Meters (2)

[View as a Diagram](#)

[Add Another Meter](#)

| Name | Water Meter | Most Recent Bill Date | Action |
|--------------|----------------|-----------------------|--------------|
| Office Water | Potable Indoor | 12/31/2013 | I want to... |
| Retail Water | Potable Indoor | 12/31/2013 | I want to... |

Get Started Setting Up Meters for Mixed Use Bldg

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meter-formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up. And finally, you can hire an organization that exchanges data to update your energy data automatically.



Sources of Your Property's Energy

How does your property [acquire energy](#)? Please select all that apply.

- Electric
 - purchased from the grid
 - generated on site with my own solar panels
 - How Many Meters?
 - generated on site with my own wind turbines

- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel

- District Steam
 - How Many Meters?

- District Hot Water
- District Chilled Water
 - from an electric-driven chiller
 - from an absorption chiller using natural gas
 - from an engine-driven chiller using natural gas
 - from another kind of chiller

Don't see your energy sources?

[+ See more energy sources?](#)





Entering Data

- 3 ways to enter data for your property or portfolio:
 1. Enter data manually
 2. Upload data using spreadsheet templates
 3. Work with 3rd party providers that exchange data directly with Portfolio Manager via web services

Manage Bills (Meter Entries) for [Mixed Use Bldg](#)

You may select one of your meters to get started. Or, if you are coming here from your meter list, a meter may already be selected.

Tell us which meter you would like to enter or manage bill information for:

Retail Elec (acct 111) ▼

Select Meter

These are your already created meters. Do you need to [Add another meter](#)?

Display Year(s): 2013 x

| | Start Date | End Date | Usage kWh (thousand Watt-hours) | Cost (\$) | Estimation | Green Power | Last Updated |
|--------------------------|------------|-----------|------------------------------------|-----------|--------------------------|--------------------------|---------------------------|
| <input type="checkbox"/> | 1/1/2013 | 1/31/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 2/1/2013 | 2/28/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 3/1/2013 | 3/31/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 4/1/2013 | 4/30/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 5/1/2013 | 5/31/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 6/1/2013 | 6/30/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 7/1/2013 | 7/31/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 8/1/2013 | 8/31/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |
| <input type="checkbox"/> | 9/1/2013 | 9/30/2013 | 50 | 50 | <input type="checkbox"/> | <input type="checkbox"/> | 2/19/2014 Boston BERDO |

Summary Details **Meters** Goals Design

Energy & Water Consumption

[Manage/Enter My Bills](#)

Meters for Performance Metrics

[View/Edit Configuration](#)

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[View as a Diagram](#)

[Add Another Meter](#)

| Name | Water Meter | Most Recent Bill Date | Action |
|--------------|----------------|-----------------------|--------------|
| Office Water | Potable Indoor | 12/31/2013 | I want to... |
| Retail Water | Potable Indoor | 12/31/2013 | I want to... |



Meters to add to Total Consumption for Metrics for Mixed Use Bldg

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.



Property Totals



Energy Meters

Check the boxes for the meters that should be included in the energy metrics:

| <input type="checkbox"/> | Meter Name |
|-------------------------------------|----------------------------|
| <input checked="" type="checkbox"/> | Retail Elec (acct 111) |
| <input checked="" type="checkbox"/> | Fuel Oil (flo. 2) |
| <input checked="" type="checkbox"/> | Office Electric (acct 999) |

Total of 3 energy meter(s). Tell us what these meter(s) measure:

- These meter(s) account for the total energy consumption for this property.
- These meter(s) do not account for the total energy consumption for this property.



Water Meters

Check the boxes for the meters that should be included in the water metrics:

| <input type="checkbox"/> | Meter Name |
|-------------------------------------|--------------|
| <input checked="" type="checkbox"/> | Office Water |
| <input checked="" type="checkbox"/> | Retail Water |

Total of 2 water meter(s). Tell us what these meter(s) measure:

- These meter(s) account for the total water consumption for this property.
- These meter(s) do not account for the total water consumption for this property.

Because of the wide variety of ways that people meter their properties, after you create meters for your property in Portfolio Manager, you must indicate which meters to use for your property metrics. In some cases, you will not want a meter to count for your metrics. For example, if you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Apply Selections

[Cancel](#)

Welcome BostonFERDO: Account Settings | Contacts | Help | Sign Out

ENERGY STAR PortfolioManager®

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs



Source EUI

What is the total energy footprint of my properties, including raw fuel associated with generation and transmission?

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card

Templates & Reports (10)

[Create a New Template](#)

| Name | Status | Action |
|------------------------------------------------------------------------------------------------------------|------------------------------|--------------|
|  Annual Reporting | Generated: 2/24/2014 9:31 PM | I want to... |
|  Performance Highlights | No Report Generated | I want to... |
|  Energy Performance | No Report Generated | I want to... |
|  Emissions Performance | No Report Generated | I want to... |
|  Water Performance | No Report Generated | I want to... |

Select Information & Metrics to Include

Selected items: 4 of 50 maximum ([View Selection](#))

- Property Information
- Property ID Numbers
- Property Use Details
- Energy Use by Fuel Source**
- Data Accuracy
- Energy Performance Metrics
- Cost Performance Metrics
- Water Performance Metrics
- Greenhouse Gas Emissions
- Renewable Energy & Green Power
- ENERGY STAR Certification
- Property Design
- Target Metrics
- Sustainable Buildings Checklist

- Electricity Use - Grid Purchase and Generated from Onsite Renewable Systems (kWh)
- Electricity Use - Grid Purchase and Generated from Onsite Renewable Systems (kBtu)
- Electricity Use - Grid Purchase (kWh)
- Electricity Use - Grid Purchase (kBtu)
- Electricity Use - Generated from Onsite Renewable Systems and Used Onsite (kWh)
- Electricity Use - Generated from Onsite Renewable Systems and Used Onsite (kBtu)
- Natural Gas Use (therms)
- Natural Gas Use (kBtu)
- Fuel Oil #1 Use (kBtu)
- Fuel Oil #2 Use (kBtu)
- Fuel Oil #4 Use (kBtu)
- Fuel Oil #5 & 6 Use (kBtu)
- Diesel #2 Use (kBtu)
- Kerosene Use (kBtu)
- Propane Use (kBtu)
- Liquid Propane Use (kBtu)
- District Steam Use (kBtu)
- District Hot Water Use (kBtu)
- District Chilled Water Use (kBtu)



Savings

- Massachusetts High School:
- 2 years old, scored an “8”
- Energy Audit showed: Energy Management System was improperly set, heat & lights on when no one was in the building.
- Annual savings: \$40-\$60K/yr



Assistance

buildings@energystar.gov

Portfolio Manager 101 and 201 webinars and guides

<http://www.energystar.gov/buildings/training>

FAQs

<http://portfoliomanager.supportportal.com>



Contact

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www.energystar.gov/benchmark