EPA's new Portfolio Manager tool

Rev up your building's energy performance
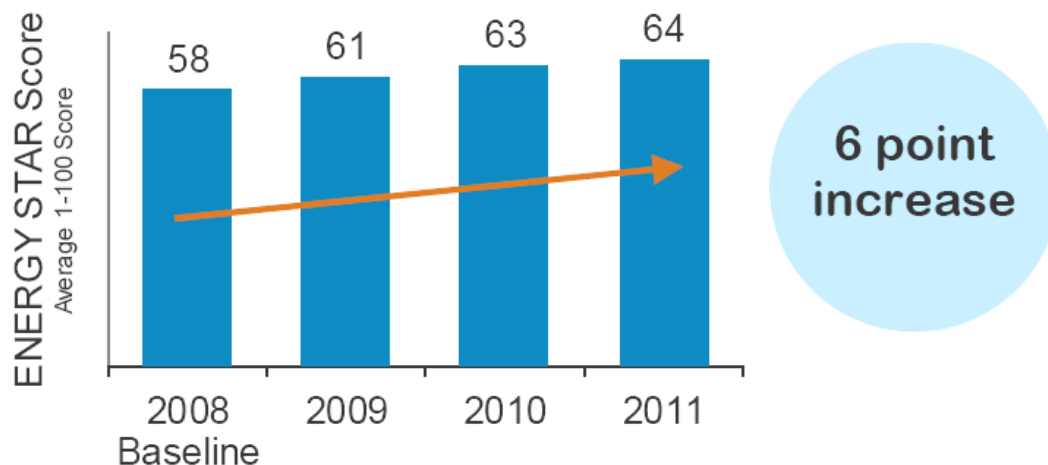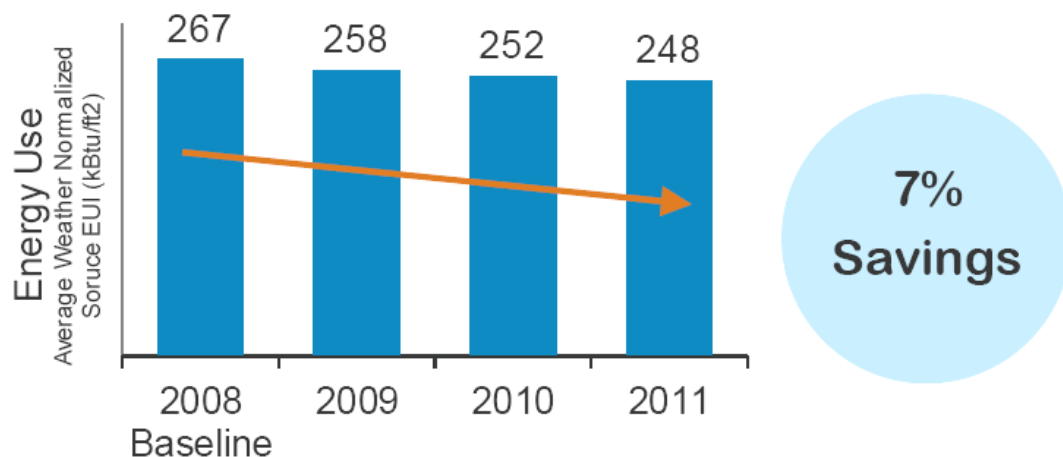
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PortfolioManager®

Value of Benchmarking

Consistent benchmarking in buildings results in energy savings and improved performance

2

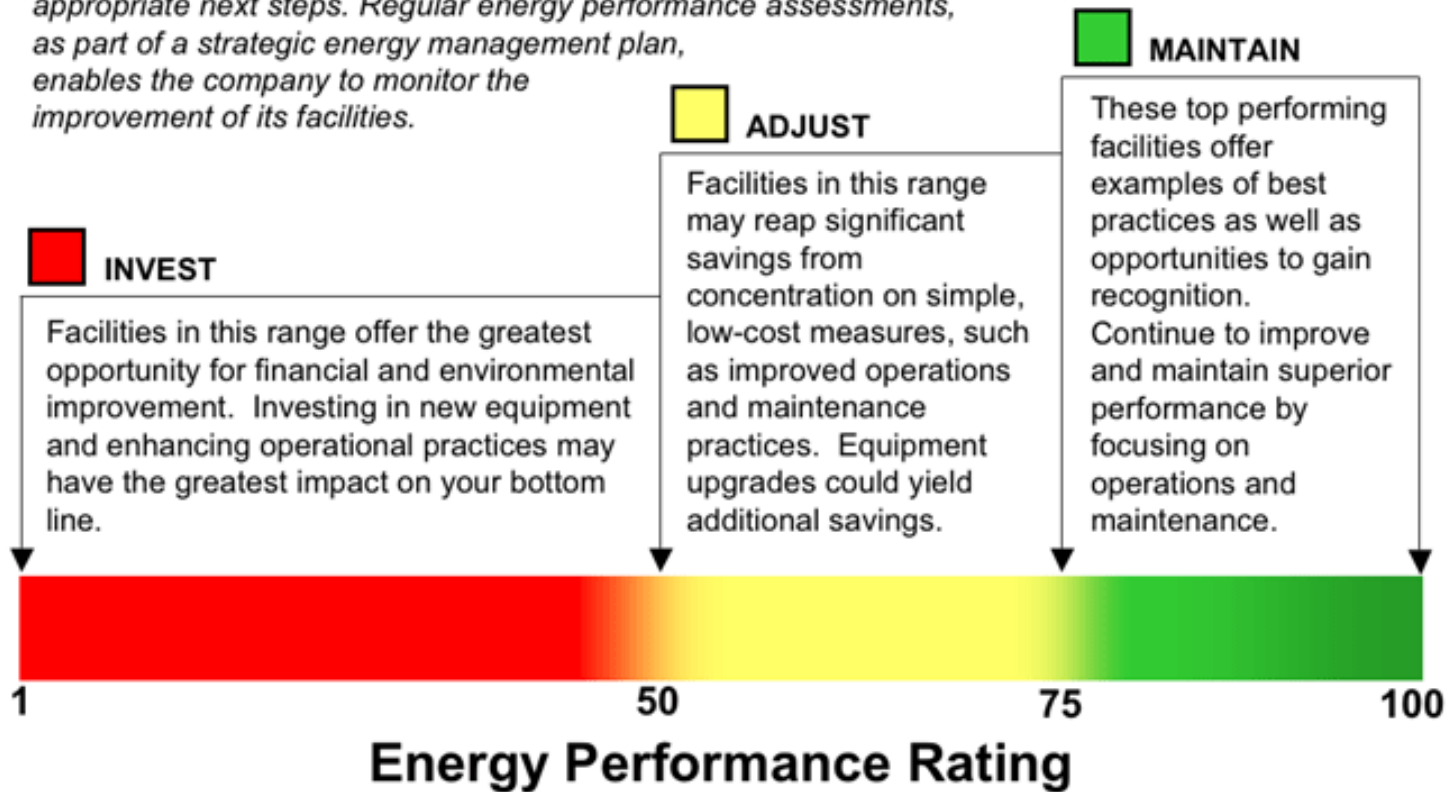## Energy Savings in Portfolio Manager

Energy Use — Average Weather Normalized Source EUI (kBtu/ft2)

| 267 | 258 | 252 | 248 |

2008 Baseline | 2009 | 2010 | 2011

7% Savings

ENERGY STAR Score — Average 1-100 Score

| 58 | 61 | 63 | 64 |

2008 Baseline | 2009 | 2010 | 2011

6 point increase

Understand
Comparative Performance

- ALL buildings can be benchmarked

- 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

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.

MAINTAIN

These top performing facilities offer examples of best practices as well as opportunities to gain recognition. Continue to improve and maintain superior performance by focusing on operations and maintenance.

ADJUST

Facilities in this range may reap significant savings from concentration on simple, low-cost measures, such as improved operations and maintenance practices. Equipment upgrades could yield additional savings.

INVEST

Facilities in this range offer the greatest opportunity for financial and environmental improvement. Investing in new equipment and enhancing operational practices may have the greatest impact on your bottom line.

1   50   75   100

Energy Performance Rating

EPA's New Portfolio Manager

With the new Portfolio Manager: Available July 17!

- ➤ Navigate with ease
- ➤ Enter data quickly and accurately
- ➤ Connect and share with others
- ➤ Plan and set goals
- ➤ Display data in colorful charts & graphs
- ➤ Apply online for the ENERGY STAR

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ENERGY STAR Benchmarking Policies
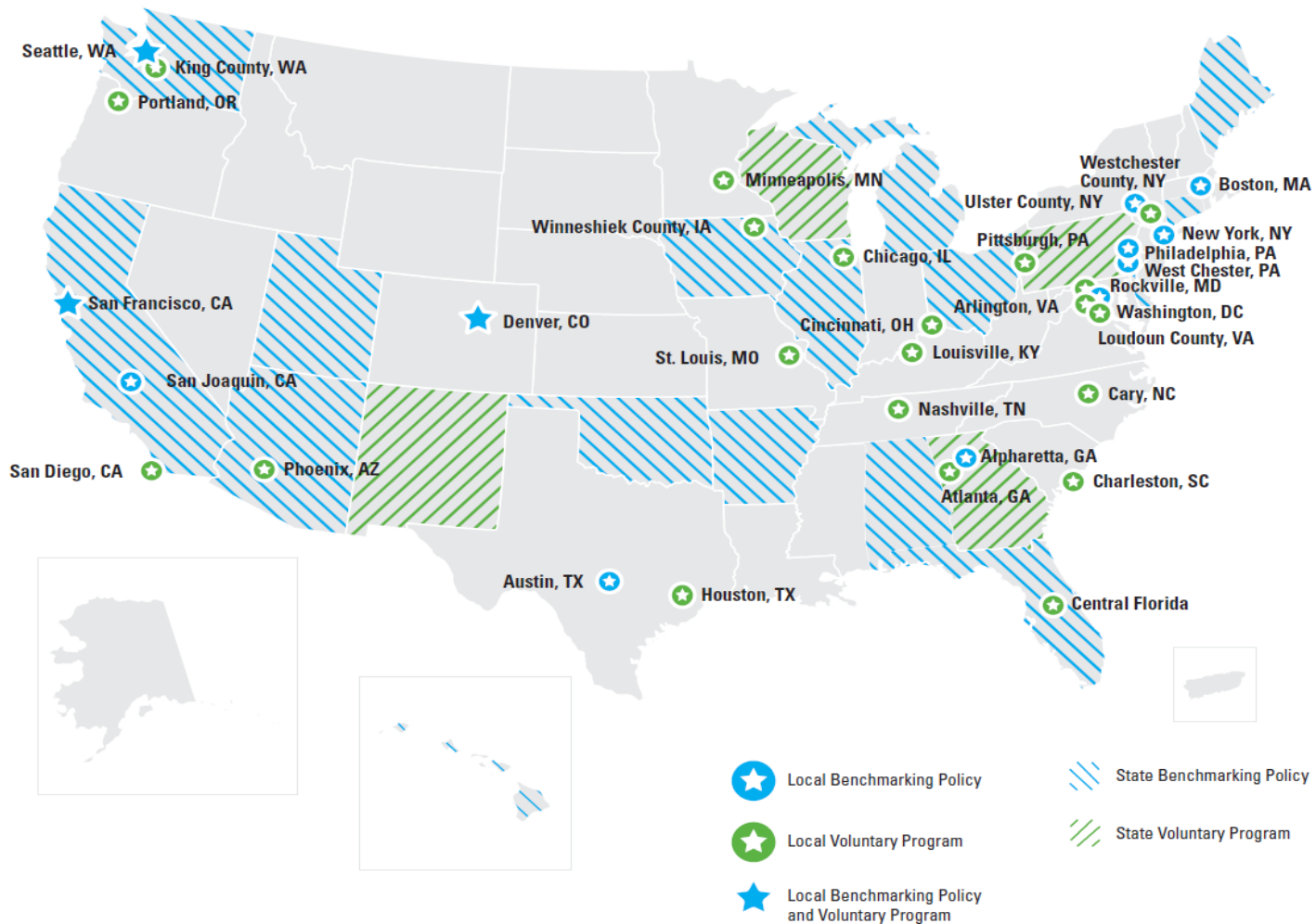
To Get Started Benchmarking in Portfolio Manager

- Helpful data to have on hand
  - Property Information
    - Function
    - Name, street address, ZIP/postal code

  - Property type data
    - Gross floor area
    - Use details (ex. weekly operating hours, number of computers, number of workers on the main shift, etc)

  - Energy consumption data
    - Property-specific invoice information from all purchased and on-site generated energy for all fuel types

Navigate the New Portfolio Manager

Five portfolio level tabs

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

Five property tabs

| Summary | Details | Meters | Goals | Design |
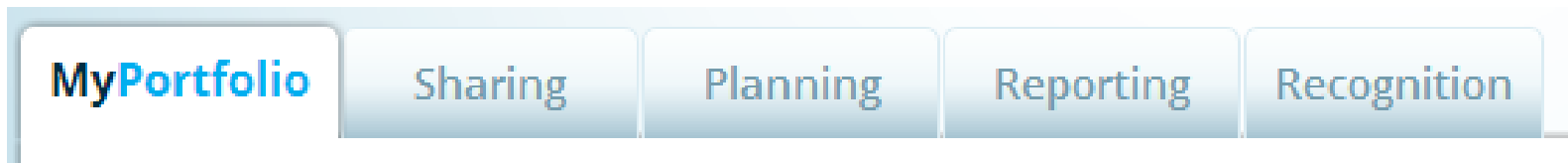
Intuitive navigation – multiple ways
to get to the same place

Navigate the New Portfolio Manager

Portfolio level

Navigate with ease

Property level summary page

Enter data quickly & accurately

New data entry wizards to walk you through the process step-by-step

More spreadsheet template import options

Improved alert messages highlight errors

Enter data quickly & accurately

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

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Get Data In: Manually with the help of Portfolio Manager prompts

Enter data quickly – Spreadsheet Upload

Enter data quickly – Web Services

- Enables energy service companies and utilities to exchange data with Portfolio Manager to
  - Manage building and energy data for customers
  - Access the ENERGY STAR score and other performance metrics from Portfolio Manager
- Users taking advantage of web services will need to "connect" with their web service provider

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Enter data quickly – Set up a Property

Follow guided steps to get your property and meters set up quickly

Enter data quickly – Set up meters

Simply identify the sources of your energy and water, and the number of associated meters

Set up meters

Enter data accurately

Automatic alerts catch and identify where you have a gap or overlap in meter data

Connect and Share

Ability to search for other users and form a "connection"

Share multiple properties at once and customize sharing rights

Set access levels for multiple properties and contacts and the same time

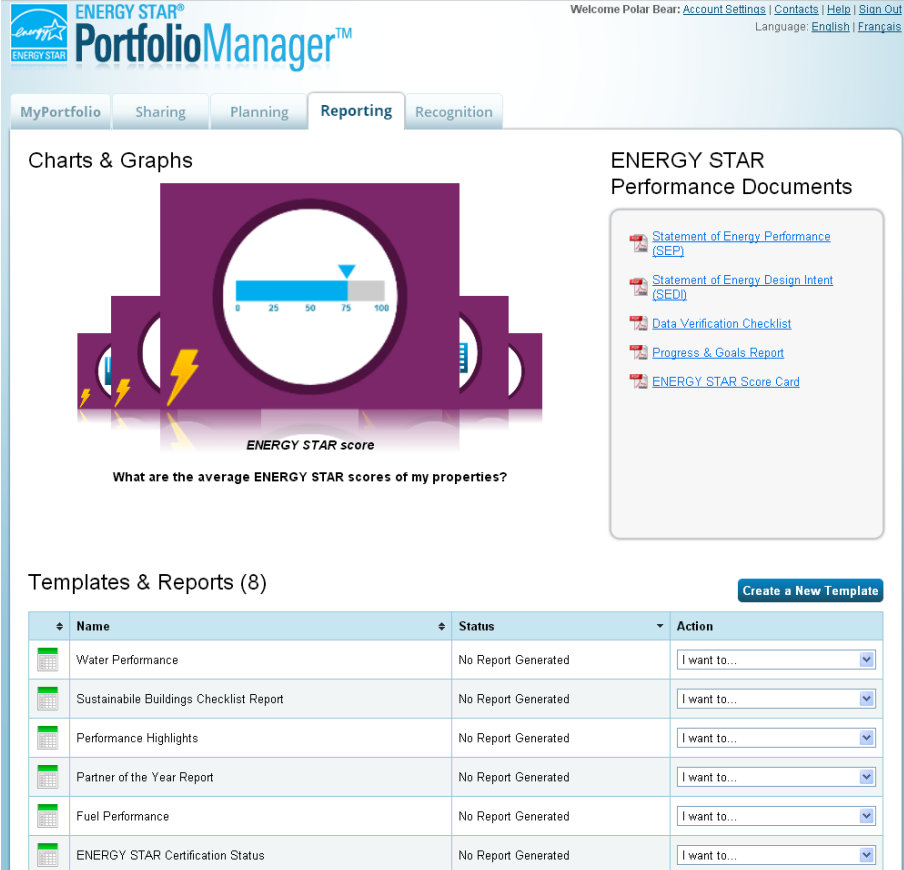# Sharing

Reporting

New graphs and table throughout the tool

Graphs can be easily exported as images for use in your presentations and reports

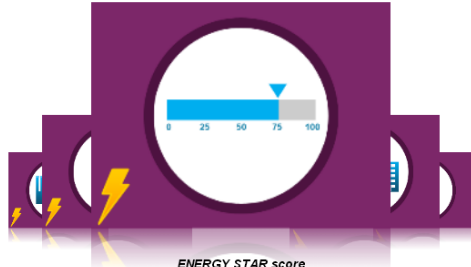Expanded feature to create a big table with your own selected metrics and export to Excel

Reporting

Choose from Pre-set Chart & Graph options

Create and generate Templates & Reports

Download Performance Documents

Applying for the ENERGY STAR

A new "progress widget" shows all the steps in the process

Go back and edit your data from within the application

Re-generate a revised application on your own

Submit applications online!

Your Application Process

✔ About Your Property

✔ Contact Information

▶ Award Information

▶ Eligibility Details

▶ Generate for Signatures

▶ Site Visit

▶ Revise & Regenerate

▶ Submit Application

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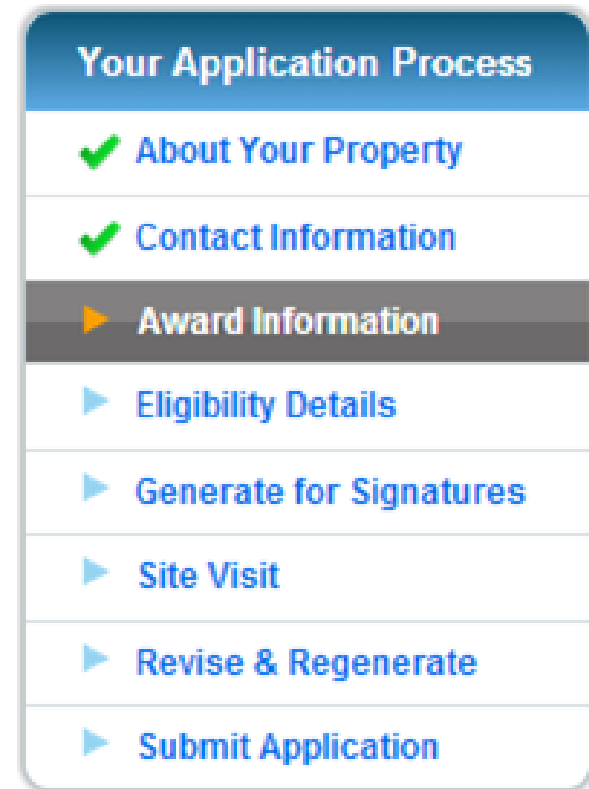
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Recap

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