

## Partner of the Year – Energy Management Application Section 2 (40 points)

### Supplemental Guidance Document for Building Partners

**Note: This guidance is not applicable to Industrial Partners. Instructions for Industrial Partners are included in section 2B of the Partner of the Year – Energy Management Application**

Section 2 of the ENERGY STAR Partner of the Year – Energy Management application focuses on actual, quantified energy performance improvements achieved by your organization during the past year. It is stated that “all Buildings Partners **must** provide a report from Portfolio Manager showing your organization-wide improvements.” This document provides more detailed guidance for partners seeking to generate this report.

### General Overview

In Section 2 of the Partner of the Year application, partners must describe **actual energy performance improvements** achieved by their organization **during the past year**. Both the magnitude of improvement, as well as the level of current energy performance (relative to peer organizations), will be considered. In reviewing Section 2, EPA will look for information such as:

- Total number of buildings in your portfolio versus the total number of buildings being actively benchmarked in Portfolio Manager
- Reductions in energy consumption and energy intensity achieved across the portfolio during the past year
- Number of buildings that have earned the ENERGY STAR label (if applicable)
- ENERGY STAR Leaders recognition (if applicable)
- Further information or context that explains energy performance results (especially if there are properties in the portfolio that are not being benchmarked or that cannot be included in portfolio-wide reporting due to data limitations or other issues)

In order to help partners report their energy performance improvement data in a consistent manner, EPA has developed the **Partner of the Year Energy Performance Report (POY EPR)**, which can be accessed via Portfolio Manager. Please note:

- The POY EPR is intended to calculate a **year-over-year comparison** of aggregate energy performance data for all buildings in your Portfolio Manager account
- For the POY EPR to work properly, energy consumption data across all buildings should be current and should cover at least 24 consecutive months.
- All applicants are required to provide a printout of the POY EPR as a **supplemental attachment** that supports the Section 2 narrative.
- It will take up to 1 business day for the POY EPR to be generated and sent to the applicant after the applicant submits a request for the report via Portfolio Manager. **EPA will not be able to extend the application deadline for applicants that did not request their POY EPR in a timely manner, so applicants are encouraged to allow plenty of time for receipt of the report, correction of any problems, and regeneration of the report if needed.**

Further details on the POY EPR – including setting appropriate date ranges when requesting the report – are provided below and in the [Frequently Asked Questions](#).

## Directions for Requesting a Partner of the Year Energy Performance Report (POY EPR)

1. Go to <https://www.energystar.gov/istar/pmpam/>.
2. Log into the Portfolio Manager account that contains all of the buildings and benchmarking data for your organization.
3. From the “My Portfolio” page, click on the link that reads “[Request](#) Energy Performance Report” (see image below).

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the 'PORTFOLIO MANAGER' header includes the ENERGY STAR logo and navigation links for ACCOUNT INFORMATION, CONTACTS, FAQ, FREQUENTLY ASKED QUESTIONS, CONTACT US, HELP, and LOGOUT. Below the header, the breadcrumb 'Home > My Portfolio' is visible. The main content area is divided into two columns. The left column features a 'Portfolio Averages' table with the following data:

Portfolio Averages	
Baseline Rating: 67 Facilities Included: 124	Current Rating: 71 Facilities Included: 124
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): -4.1% Facilities Included: 129	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Change from Baseline, Adjusted Energy Use</a>	

The right column contains several sections of links: 'Add a Property' (with sub-link 'Import Facility Data Using Templates'), 'Work with Facilities' (with sub-links 'Update Multiple Meters' and 'Share Facilities'), 'Reporting and Analysis' (with sub-link 'Request Energy Performance Report'), 'Apply for Recognition' (with sub-links 'Apply for the ENERGY STAR ENERGY STAR Leaders'), and 'Automated Benchmarking' (with sub-link 'Get Started Now'). A red arrow points to the 'Request Energy Performance Report' link, which is labeled '3.)'. Below these sections, a message states 'You have been granted access to [Shared Facilities!](#)'. At the bottom of the page, there are filters for 'GROUP: All Facilities' and 'VIEW: Summary: Facilities', along with a search bar and a 'Download in Excel' link. The footer shows 'Results 1 - 50 of 137' and a 'Next' link.

4. You will be taken to a page titled “Energy Performance Report” (see image below). From this page, you will be able to select from a number of criteria as you request your report.

**ENERGY STAR** PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Energy Performance Report

## Energy Performance Report

Energy Performance Reports display your facilities' energy performance in either a summary or comparative format. To request an Energy Performance Report, please enter or select the criteria below. On the next page, you will be required to provide an e-mail address for the report to be e-mailed to you. Delivery of reports will take one business day.

REQUIRED

### Energy Performance Report Criteria

\* Please select the type of report:

Summary for year ending: Month Year

Comparative for year ending: Month Year to year ending: Month Year

Partner of the Year comparative for year ending: 10 2009 **5.)**

Based on the date selected, this report will compare a full year of data ending October, 2008 to a full year of data ending October, 2009. Only those facilities with a full twelve months of energy and space data in BOTH years will be included in the Partner of the Year report. [Learn More](#)

\* Please select the facilities:

All facilities in my portfolio **6.)**

Group: Shared Facilities

I'll choose specific facilities from my portfolio

Select a facility location (optional):

State: All States **7.)**

Or

Zip Code:

\* Please select at least one report column:

Site Energy Intensity (kBtu/Sq.Ft.) **8.)**

Weather Normalized Source Energy Intensity (kBtu/Sq.Ft.)

Site Electric Use (kWh)

Site Natural Gas Use (Therms)

CANCEL CONTINUE

5. In the first section, "Please select the type of report," choose the third option, "Partner of the Year comparative for the year ending...."
  - In the drop-down boxes to the right, please indicate the reporting period that you would like to use for demonstrating progress in 2009
  - You must select the most recent 12-month period for which you have current meter data across the majority of your properties.
  - The tool will automatically set the comparison period in order to generate a year-over-year analysis of your portfolio.
  - For example, if you request a POY EPR for the 12-month period ending October 2009, the tool will automatically compare this to the 12-month period ending October 2008.
  - For more guidance, please see the Frequently Asked Question "[What date should I choose when requesting a Partner of the Year Energy Performance Report?](#)"
6. In the second section, "Please select the facilities," you must choose the first option, "All facilities in my portfolio."
7. In the third section, "Select a facility location (optional)," choose the default option, "All States."
8. In the final section, "Please select at least one report column," note that all selections have already been made for you. No further selection is necessary.

9. Click "Continue."
10. You will be taken to a final confirmation page (see below), which will ask for an e-mail address where the report can be sent.
  - The default e-mail address will be that of the individual who is listed as the administrator of this Portfolio Manager account.
  - If necessary, you can manually enter an alternate e-mail address.
  - Only one e-mail recipient can be assigned per request.

**Confirm E-mail Address**

The Partner of the Year Energy Performance Report will be e-mailed to the address displayed below. If this address is not correct, please change it before requesting a report. An e-mail address change will update your user account information.

Report will be sent to:

**10.)**

11. Click "Request Report."
  - You will receive a confirmation e-mail that will include an EPR identification number for tracking purposes.
  - Your POY EPR will be delivered to you in one business day.

## Interpreting Results of the POY EPR

1. The POY EPR, will arrive via e-mail as an attached Excel file and will contain two “tabs”:
  - The first tab provides a summary overview of the entire portfolio
  - The second tab provides more specific data for all properties included within the report.

A screen shot of the first tab is provided below.

<b>Partner of the Year Comparative Energy Performance Report</b>			
<b>Facilities included: All Facilities</b>			
<b>Located in:</b>			
<b>Date Generated: 8/18/09</b>			
<b>Number of facilities in report: 24*</b>			
<b>Number of facilities in portfolio: 63</b>			
	Year ending 12/2007	Year ending 12/2008	Change
Total Floorspace (sq. ft.)	8,614,130	8,620,596	6,466
Average Rating	81	82	1
Number of Facilities with a Rating	24	24	0
Number of Facilities not eligible to receive a rating**	0	0	0
Total Site Energy Use (kBtu)	607,297,407	599,767,644	-7,529,763
Total Weather Normalized Source Energy Use (kBtu)	1,854,724,921	1,807,763,782	-46,961,138
Average Weather Normalized Source Energy Intensity (kBtu/Sq. Ft.)	215.3	209.7	-5.6
Average Site Energy Intensity (kBtu/Sq. Ft.)	70.5	69.6	-0.9
Total Site Electric Use (kWh)	156,102,767	152,532,596	-3,570,170
Total Site Natural Gas Use (Therms)	665,439	742,388	76,949
Average Actual Annual Source Energy Intensity (kBtu/Sq. Ft.)	216	211.5	-4.5

\*Only facilities with a full year of energy data in each of the two comparison years are included in the facility summary.

\*\*Facilities that are not eligible to receive a rating are defined as buildings that currently are ineligible to receive the ENERGY STAR rating due to (1) their operating characteristics; (2) their property type; and/or (3) incomplete energy data for the period being rated.

2. On the summary tab, the report will tell you how many properties are in your portfolio, and how many of these properties were included in the report. (Per step 6 in the previous section, when selecting facilities for inclusion in the POY EPR, users must choose “all facilities in my portfolio”).
  - In the example above, the portfolio for which the POY EPR was requested contained 63 properties. However, only 24 properties had 24 consecutive months of energy performance data; therefore, the summary data included in the report is limited to these 24 properties.
  - For more information, please see the Frequently Asked Questions [“Why is my POY EPR returning results for fewer properties than I requested?”](#) and [“How do I provide complete data on my portfolio’s performance if the POY EPR does not include all of my properties?”](#)

## Frequently Asked Questions

### 1. What date should I choose when requesting a Partner of the Year Energy Performance Report (POY EPR)?

- POY EPRs must be generated for the period ending August 2009 or later. Applicants are encouraged to choose the most recent date for which the majority of their properties will be included in the report (i.e., the most recent date for which the majority of properties have 24 consecutive months of data).
- For example, if you have a portfolio of 40 buildings – 30 of which have 24 consecutive months of data through September 2009, and 10 of which have 24 consecutive months of data through October – then you should request your POY EPR for the year ending September 2009. (If you were to request the report through October, the majority of your buildings would not be able to return meaningful results, since their energy consumption information is not current through the period selected).
- Helpful hints:
  - Go to the “My Portfolio” page of your Portfolio Manager account and pull up the “Summary: Facilities” view.
  - Click on the column heading that says “current energy period ending date.” This will sort all of your buildings according to their current period ending date (click the small arrow that appears to switch between ascending and descending order).
  - With the buildings sorted, scroll through your portfolio to find the latest period ending date that applies to the majority of your properties.

Facility Name	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date	Eligibility for the ENERGY STAR	Last Modified
<a href="#">Test 123</a>	N/A	N/A	0	Less than 1 year of data; Data > 120 days old	02/29/2000	N/A	
<a href="#">Sample Multifamily</a>	N/A	0.0	200,000	Data > 120 days old	12/31/2000	N/A	08/07/2009
<a href="#">Test Grocery</a>	100**	0.0	50,000	Data > 120 days old	12/31/2001	Not Eligible: Default space values used ( <a href="#">ENERGY STAR Eligibility Rules</a> )	02/20/2009
<a href="#">Test Office w/ Defaults</a>	81**	0.0	100,000	Data > 120 days old	12/31/2003	Not Eligible: Default space values used ( <a href="#">ENERGY STAR Eligibility Rules</a> )	09/28/2007
<a href="#">Average Building 70</a>	N/A	N/A	100,000	Less than 1 year of data; Data > 120 days old	08/31/2004	Not Eligible: Rating must be 75 or above ( <a href="#">ENERGY STAR Eligibility Rules</a> )	09/28/2007
<a href="#">Average Building 90</a>	93**	0.0	100,000	Data > 120 days old	08/31/2004	Not Eligible: Default space values used ( <a href="#">ENERGY STAR Eligibility Rules</a> )	09/28/2007
<a href="#">Sample MOB</a>	8	0.0	50,000	Data > 120 days old	04/30/2005	Not Eligible: Rating must be 75 or above ( <a href="#">ENERGY STAR Eligibility Rules</a> )	06/16/2006
<a href="#">Average Office Building - 1 Office Space</a>	44	1.1	100,000	Data > 120 days old	05/31/2006	Not Eligible: Rating must be 75 or above ( <a href="#">ENERGY STAR Eligibility Rules</a> )	06/23/2009
<a href="#">Average Office Building</a>	44	-5.2	100,000	Data > 120 days old	05/31/2006	Not Eligible: Rating must be 75 or above ( <a href="#">ENERGY STAR Eligibility Rules</a> )	06/23/2009

## 2. Why is my Partner of the Year Energy Performance Report (POY EPR) returning results for fewer properties than I requested?

- The POY EPR will only consider those properties for which there are 24 consecutive months of complete energy consumption data for the time period chosen. **Any buildings that do not have 24 consecutive months of complete energy consumption data for the report date chosen will not be included in the POY EPR.**
- To learn which properties were not included in your POY EPR, please view the second tab of the report, entitled “Facility List.” This list will contain only those properties for which there are 24 consecutive months of data. By comparing this list against the list of buildings in your whole portfolio, you can see which buildings were excluded from the POY EPR.
- The most common causes for a property or properties to be excluded from the POY EPR (and their likely solutions) are described below. Once you have identified and resolved as many of these issues as possible, you should request a new POY EPR, which should include many of the properties that were previously excluded.
  - **Issue 1:** The property or properties in question do not have *current* energy consumption information through the period ending date selected for the report (e.g., the report was run for a period ending October 2009, but a certain number of properties only have complete data through September 2009).
  - **Solution 1:** Users should strive to obtain the latest month(s) of meter entries for these properties, so that they can be included in the POY EPR. If this cannot be done for a sufficient number of properties, users should try setting the POY EPR period ending date one month earlier and then request a new report. Please note that POY EPRs must be generated for the period ending August 2009 or later.

\* \* \*

- **Issue 2:** The property or properties in question did not have *complete energy consumption data stretching back at least 24 months* from the period ending date selected for the report (e.g., the report was run for a period ending October 2009, but for a certain number of properties, the meter data only extend back 15 months).
- **Solution 2:** In many cases, users will have access to historical data that have not been entered into Portfolio Manager. In such situations, users should go into Portfolio Manager and should “back-fill” the meter entries for the buildings in question so that the energy consumption information for these buildings comprises 24 months or more. In some cases 24 months of data will not be available (e.g., the building was constructed and put into operation within the last 24 months; or the building was purchased by the applicant within the last 24 months). For guidance on such scenarios, please see the Frequently Asked Question [“How do I provide complete data on my portfolio’s performance if the POY EPR does not include all of my properties?”](#)

\* \* \*

- **Issue 3:** The property or properties in question have energy consumption information stretching back more than 24 months prior to the selected POY EPR period ending date, but there is a discontinuity somewhere within the 24 months under analysis.
- **Solution 3:** Users can identify these properties by cross-referencing them in Portfolio Manager, looking for any “Energy Use Alerts” for the time period under consideration, and addressing the cause of the alert indicated. For more on energy use alerts, [click here](#).
- It is important that you strive to include as many of your facilities as possible in your POY EPR. EPA understands that it may not always be possible to include all properties in the report; however, the reasons for any gaps should be explained in the Section 2 narrative. For more information, see the Frequently Asked Question [“How do I provide complete data on my portfolio’s performance if the POY EPR does not include all of my properties?”](#)
- Please note that properties that are not eligible to receive the ENERGY STAR rating due to their space type configuration can still be included in the POY EPR, provided that they have at least 24 months of complete, consecutive energy consumption data.
  - Examples of such buildings include rating-ineligible space types (e.g., malls, restaurants, stadiums, convention centers, museums, multifamily housing), as well as rating-eligible space types that have more than 10% computer data center space or more than 10% of their gross square footage defined as “Other.”
  - Such properties will not be able to count towards the “average rating” reported in the POY EPR; however, their energy consumption and energy use intensity will be included in the calculations of portfolio-wide averages.

**3. How do I provide complete data on my portfolio's performance if the Partner of the Year Energy Performance Report (POY EPR) does not include all of my properties?**

- Leaders in energy efficiency should be making all reasonable efforts to collect the data needed to benchmark their properties and to report on portfolio-wide performance. Even if you are actively benchmarking your entire portfolio, however, EPA recognizes that it may not always be possible to generate a POY EPR that includes all properties. In these cases, please consider the following guidance.
- Start by ensuring that energy consumption for all buildings is as complete and as current as possible. For more information, please see the Frequently Asked Question ["Why is my POY EPR returning results for fewer properties than I requested?"](#)
- Identify those remaining properties for which you are unable to obtain 24 complete, consecutive months of energy consumption data. You will need to be able to explain generally, in the Section 2 narrative, why a given property (or a given number of properties) did not have enough benchmarking data to be included in the POY EPR. For example:
  - A property or group of properties was purchased by your organization within the last 24 months, and there is no historical energy consumption data available from before the date of purchase.
  - A property or group of properties underwent a significant renovation in the past 24 months, during which time the building was not operational (or was operating substantially below full capacity), and was not being actively benchmarked.
- For those properties that are not included in the POY EPR, applicants are encouraged to provide energy performance data to the extent possible. For example, even if some properties have fewer than 24, but more than 12, months of energy consumption data, applicants can still use Portfolio Manager to provide EPA with meaningful performance data (such as improvements over a baseline).
- Remember that the response to Section 2 of the application is not just a matter of printing out the POY EPR; applicants must also provide a narrative that provides the context for the data contained within the report.