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Supplemental Guidance Document for Section 3A of the Partner of the Year - Energy Management Application

Note: This special guidance is only applicable to Commercial and Institutional Building Partner applicants completing Section 3A of the Partner of the Year - Energy Management Application. Separate instructions for Industrial Partners are included within Section 3B of the application.

This document provides detailed guidance for completing Section 3A of the ENERGY STAR Partner of the Year - Energy Management application for Commercial and Institutional Building Partners. Section 3A is intended to assess actual, quantified energy performance improvements achieved by your organization during the past year, and requires applicants to provide a Partner of the Year (POY) report from Portfolio Manager documenting these improvements. This guidance document provides directions for generating the POY report which EPA will use, in conjunction with other information in Section 3, to assess the following:

- Reduction in energy consumption, energy use intensity, and greenhouse gas emissions achieved across the portfolio during the past year
- Number of buildings that have earned the ENERGY STAR (if applicable)
- General movement toward improved energy performance, with context provided to explain performance results, if needed
- Extent of portfolio-wide benchmarking, with context provided to explain why any buildings or building data cannot be included in portfolio-wide reporting (e.g., new building acquisitions, less than 24 months of data available, etc.)

Directions for Generating a Partner of the Year (POY) Report

Step 1. Go to <https://www.energystar.gov/benchmark> to log in to Portfolio Manager.

Step 2. Log in to the Portfolio Manager account that contains all of the buildings and benchmarking data for your organization. You must submit building data for your organization's entire portfolio. If you cannot provide benchmarking data for certain buildings, or the buildings are not reflected in the account, be sure to address this in Section 2 of the application.

Step 3. Click on the "Reporting" tab.

Step 4. Identify the "Partner of the Year Report" in the list of reports at the bottom of the page. A screenshot of the "Reporting" tab and the list of reports available is provided below.

The screenshot displays the Energy Star Reporting interface. At the top, there are navigation tabs: MyPortfolio, Sharing, Planning, Reporting (selected), and Recognition. Below the tabs, there are two main sections: "Charts & Graphs" and "ENERGY STAR Performance Documents".

The "Charts & Graphs" section features a large graphic with a circular gauge showing an ENERGY STAR score. Below the graphic, it asks, "What are the average ENERGY STAR scores of my properties?".

The "ENERGY STAR Performance Documents" section lists several documents with links: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SEDI), Data Verification Checklist, Progress & Goals Report, and ENERGY STAR Score Card.

Below these sections is the "Templates & Reports (8)" section, which includes a "Create a New Template" button and a table of reports. The table has columns for Name, Status, and Action. The "Partner of the Year Report" is highlighted, and its "Action" dropdown menu is open, showing options: "Generate New Report", "I want to...", and "Generate New Report".

Name	Status	Action
Partner of the Year Report	No Report Generated	Generate New Report I want to... Generate New Report
ENERGY STAR Certification Status	No Report Generated	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...
Fuel Performance	No Report Generated	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...

Step 5. From the drop-down box in the “Action” column next to the report name, select “Generate New Report.” You will then be taken to a screen titled “Create Partner of the Year Report”, as illustrated below.

Create Partner of the Year Report

In order to generate the spreadsheet, you will need to first select the timeframe of information to include as well as the properties you would like to see in the spreadsheet. Once you have done this, you will be able to generate your spreadsheet.

1 Select Timeframe of Information to Include

Timeframe:

with

Each property you include must have at least one complete year of data (12 full months) in order for metrics you select to be able to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report.

2 Select Properties to Include

Properties: Selected Items: 4

3 Review Included Metrics

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name
Property Information	City
Property Information	State/Province
Property Information	Postal Code
Property Information	Property Floor Area (Building(s))
Property Information	Primary Property Type - EPA Calculated

Step 6. In the “Create Partner of the Year Report” screen, you must choose a timeframe for the report.

To choose a timeframe, you must select “**Compare Two Years**” from the drop down menu, as illustrated in the screenshot above. The second period must be August 2014 or later, and should be the month for which you have complete energy data for the greatest number of buildings in your portfolio. The first period should be the same month one year prior. For example, the screenshot above will generate a report comparing August 2013 to August 2014.

Step 7. In the “Create Partner of the Year Report” screen, you must also select properties to include in the report.

You must choose “**All Properties**” from the dropdown menu, unless you have test or duplicate buildings in your account. In this case, select “Multiple Properties” from the dropdown and select all non-test or duplicate buildings to submit.

Please ensure that all non-test or duplicate benchmarked properties appear in the report, even if you do not have 24 months of data for all properties in your portfolio. ENERGY STAR asks you to do this because it is important to demonstrate the extent to which you are benchmarking the properties in your portfolio.

This screen also provides a list of metrics that are included in the report, provided under “Review Included Metrics”. You cannot change this selection of metrics.

Step 8. Click “Generate Spreadsheet” to generate the report. You will now be returned to the main page of the “Reporting” tab.

Step 9. In the list of “Templates and Reports” on the “Reporting” tab, you will see that your report has been generated, as illustrated in the screenshot below. In the “Action” column of the “Partner of the Year Report” row, use the dropdown menu to select “Download Current Report in Excel.”

The screenshot shows a web interface titled "Templates & Reports (8)" with a "Create a New Template" button. A green notification bar at the top states "Your new report(s) has been generated". Below is a table with columns: Name, Status, and Action.

Name	Status	Action
Partner of the Year Report	Generated: 9/29/2013 6:39 PM	I want to... I want to... View Current Report Download Current Report in Excel Download Current Report in XML Generate New Report Select Properties and Timeframes
ENERGY STAR Certification Status	Generated: 8/19/2013 2:51 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...
Fuel Performance	No Report Generated	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...

Open the Excel document that is generated to view your data. When you do, you will see three tabs.

- Tab 1 is named “Summary”. **You must paste the table in this tab into Section 3A of your Partner of the Year Application**, and provide a discussion of the figures.
- Tab 2 is named “Information and Metrics” and contains two rows for each of the buildings in your portfolio: one row contains data corresponding to the August 2014 (or later) period that you have selected, and the other line contains data corresponding to the comparison period selected, which should be 12 months prior.
- Tab 3 is named “Comparisons” and contains one row for each building. The tab provides the calculated difference between the two time periods reported on the “Information and Metrics” tab for each metric.

With the information provided in this report, you can describe the energy consumption characteristics of your portfolio to demonstrate improvement, or give context for instances where little or no improvement is observed.

Step 10. If you want to regenerate and/or reset the parameters of your report, you can do so by choosing “Generate New Report” from the “Action” dropdown menu illustrated under Step 9. You may want to regenerate the report if you make edits to any property energy consumption or square footage data, or if you wish to update the report to reflect a different set of comparison time periods.