



U.S. Environmental Protection Agency's
Data Management Guide
for Energy & Water Efficiency Competitions

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TABLE OF CONTENTS

HOW TO USE THIS GUIDE	1
OUTLINE OF COMPETITION DATA MANAGEMENT STAGES	2
Phase 1: Before the competition	3
STAGE 1: DESIGN THE RULES	3
STAGE 2: REGISTRATION - PREPARE FOR DATA COLLECTION	6
Phase 2: During the Competition	8
STAGE 3: DATA CHECK-IN — REVIEW DATA	8
Prepare data for analysis	8
EPA’s template Competitor Data Tracker spreadsheet.....	8
Data Quality Checklist	10
STAGE 4: CONTACT COMPETITORS ABOUT DATA ISSUES	11
Generate personalized spreadsheets detailing competitor data issues	11
Phase 3: After the competition	12
STAGE 5: IDENTIFY & VERIFY POTENTIAL WINNERS	12
Why verify?.....	12
STAGE 6: PREPARE PUBLIC RESULTS	13
Create a public-facing spreadsheet	13
APPENDIX	14
Example INSTRUCTIONS Tab for personalized data issues spreadsheet.....	14
Example energy data verification form.....	15

HOW TO USE THIS GUIDE

This guide is intended to help the Data Managers of organizational energy-efficiency competitions. The **Data Manager** is the person who's been tasked with handling the competition data, from weighing in on success metrics during the planning phases, to collecting data from competitors, to analyzing and verifying the data to determine progress and results. Ideally, this person (or team of people) should have experience working with EPA's ENERGY STAR® Portfolio Manager® to track energy performance and analyzing data within Microsoft® Excel.

This multi-stage guide covers each step in the data management process during a competition. To keep things as simple and clear as possible, we've broken the competition into three phases – before the competition, during the competition, and after the competition. For the first part of the competition, you'll work in Portfolio Manager to identify which metrics you'd like to collect, and then develop a custom report to gather this data from competitors. Once all the competitors have submitted their data, you'll pull this data from Portfolio Manager into an Excel spreadsheet for additional analysis.

To help you further in managing the data from your competition, EPA has provided a template **Competitor Data Tracker spreadsheet** as an Excel file ([downloadable from the ENERGY STAR Tools & Resources library](#)). This spreadsheet is based on the template EPA refined after seven years of managing our own year-long competitions for thousands of buildings. It includes many of the data-scrubbing formulas, alerts, and checks that EPA developed to streamline data collection and analysis, so you can put them to use for your own competition. It's also geared toward larger competitions (more than 10 buildings), and is intended to help you automate some of the more time-consuming tasks, like flagging possible errors in the data and providing individualized feedback to competitors to address data issues.

Before following the process outlined in this guide, take a look at the [ENERGY STAR Guide to Energy & Water Efficiency Competitions in Buildings & Plants](#) (the "Competition Guide"). The **Competition Guide** provides a full overview of the major considerations associated with developing and running a competition, and will be referenced throughout this document.

OUTLINE OF COMPETITION DATA MANAGEMENT STAGES

A typical competition can be divided into three overall phases and six data management stages:

Phase 1 — Before the competition

Stage 1: Design the rules

You may not be solely responsible for creating the rules of your organization's competition, but your knowledge of Portfolio Manager can help inform your team's decisions. This section outlines the top considerations and recommendations for designing a competition in which winners can be successfully identified and evaluated using data collected in Portfolio Manager.

Stage 2: Registration — Prepare for data collection

Once you or your team have decided on the rules of your competition and the metrics you'll use to evaluate winners, you'll need a way to collect competitor data. For most competitions, this is most easily done through a "custom data request" in Portfolio Manager. This section explains how to set up a custom data request and includes an overview of available metrics, as well as the rationale for collecting certain metrics.

Phase 2 — During the competition

Stage 3: Data check-in — Review data

Depending on the length of your competition, you may only collect and analyze data once at the end of the competition period, or you may schedule check-ins to occur throughout the competition period. Either way, this section provides an overview of the template **Competitor Data Tracker spreadsheet**, which EPA created based on the metrics collected as part of our own National Building Competition. It provides an explanation of the tabs and formulas you'll find in the template, as well as a [Data Quality Checklist](#). The spreadsheet is intended for competitions that use one evaluation metric for selecting an energy and/or water winner and end with one winning building per property type for energy and/or water. It's intended to be flexible — you can select which metrics you collect, which metrics you choose as evaluation metrics, and the length of your competition.

Stage 4: Contact competitors about data issues

If you identify issues in your competitor data, you'll need to connect with the appropriate contact for the building to discuss and resolve the problems. This section outlines how to create personalized spreadsheets to help you explain suspected data issues to your competitors.

Phase 3 — After the competition

Stage 5: Identify & verify potential winners

This section explains how to use the [template Competitor Data Tracker](#) spreadsheet to determine your potential winners. Depending on your competition rules, your competitors may need to have a Licensed Professional—a Professional Engineer or Registered Architect—verify their energy data.

Stage 6: Prepare public results

Once the winners have been verified, it's time to spread the word about your organization's energy-saving accomplishments! This step outlines how to create a polished, public-facing spreadsheet to communicate the competition results clearly to the public, while protecting competitor privacy.

PHASE 1: BEFORE THE COMPETITION

STAGE 1: DESIGN THE RULES

A key first step in setting up a successful competition is to identify clear metrics for success. To do so, you should have a basic understanding of what data your competitors may already have and what they may need to actively gather.

As you or your team start planning, consider the following questions:

Who are your competitors?

Define your competition boundaries:

- What types of buildings will compete? Will you limit the types of properties or is it open to any type of building?
- How many buildings will compete? Is there a cap on the number of buildings one organization can enter? Is there a minimum number of participants you'd like to engage?
- Will this be an internal competition among buildings that have already shared utility data with your Portfolio Manager account, or will you open it to external buildings?

The answers to these questions will help you determine how to set up your data collection, which is discussed in further detail in [Stage 2](#).

What data are competitors already collecting?

Relying on data that competitors are already collecting – or that can be easily accessed – will help minimize the effort needed to compete and may enable more buildings to participate. Competitions can also be an effective way to motivate owners and managers to benchmark their buildings for the first time, but you may want to offer a longer registration period if many of the buildings will be new to Portfolio Manager.

TIP!

Source vs. site energy

Source EUI accounts for the total amount of energy used to power a building, including losses in generation, transmission, and distribution. Compared to site EUI, it's a better measure of the total energy use of a building.

That doesn't mean you shouldn't also collect site EUI, which represents the amount of energy per square foot consumed on-site, at the building. This metric is likely to be more familiar to competitors, because it's the total consumption they see on their utility bills.

Which metrics do you need to collect to evaluate data?

If you're using energy use intensity (EUI) as the metric by which you'll evaluate participants, you'll need to collect the inputs that are used to calculate EUI – namely, energy use and floor area. You should also take time to verify the accuracy of those inputs for the winners.

Although the primary competition metric referenced in this guide is "source EUI," to investigate large changes in this value, it'll be useful to have both source energy use and gross floor area data.

Here are some example metrics to keep in mind when deciding what data to collect:

- Building square footage
- Building site and/or source energy consumption
- Weather-normalized building site and/or source energy consumption
- Energy and/or water costs
- 1–100 ENERGY STAR score (if available)
- Total water use

You may consider other metrics related to the space, especially if your competitors represent a handful of property types. For example, if all the competing properties are office buildings, information such as number of personal computers, weekly operating hours, and workers on main shift could be pertinent. This information can help you identify changes in the way the property operates (such as a vacancy being created or filled) that would not be apparent if you only looked at EUI.

TIP!

Expect delays in utility bills!

Build time into your competition, and consider letting competitors know that winners will not be announced until three or more months after the end of the competition period.

If your competition runs during a calendar year, be prepared to review the data starting around March, and issue recognition around April.



What is the billing schedule for your prospective competitors?

Your competition metrics depend on utility bill data, so remember that bills may not be available for data entry until up to two months after the end of the billing period. (E.g., if a competitor’s billing date falls toward the end of the month, it may take them two billing cycles to get all their energy consumption data for that month. So, it may take until early April for a competitor to receive energy data for the end of January.)

Additionally, you’ll need some time to review the utility data after the final data for the competition period has been entered, so build that into your timeline. Depending on the size of your competition and what recognition you plan on offering, the review process could add an additional month or more to your timeline.

How long will the competition run?

The competition period can be as long as a year or as short as a month. There are benefits and drawbacks to various competition durations, as discussed in the table in [The Competition Guide Chapter 6: Plan the Launch](#).

Longer competition periods may see a drop-off in attention as the months go by, but they offer more time for building staff who are implementing behavior and operations changes to achieve reductions and compete to win. Additionally, because Portfolio Manager metrics are based on 12 months of data, data for a year-long competition can be analyzed in less time.

Shorter competition periods make it easier for competitors to maintain focus and engagement through the whole event, but they favor buildings that happen to be implementing retrofits and upgrades during the competition period. All performance metrics in Portfolio Manager are annual, meaning they require 12 consecutive calendar months of data to calculate.

Because of this, if your competition period is less than a year, you’ll have overlap between the baseline and comparison years.

See Figure 2 for an example. In this scenario, the baseline period is calendar year 2016, and the competition period is January – March 2017. That means the comparison year will be April 2016 – March 2017, while the months of April – December 2016 will overlap with the baseline year.

Figure 1: Year-long competition

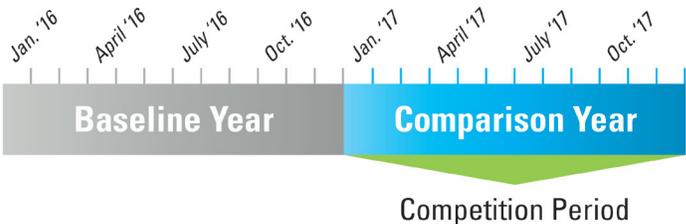


Figure 1: A year-long competition will have one baseline year and one comparison year. The comparison year is your competition period. Often, by the time a competition is announced, the baseline year is nearly over.

Figure 2: Shorter competition

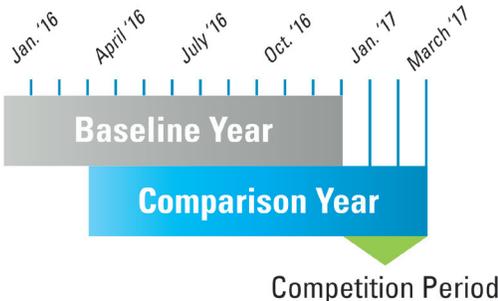


Figure 2: The months within the comparison year after the end of the baseline year is your competition period.

TIP!

Create separate external & internal timelines

As discussed in [The Competition Guide Chapter 6: Plan the Launch](#), it’s important to communicate your competition timeline to your competitors so they can plan ahead and stay on top of key deadlines.

It’s equally important to create a clear internal timeline for your competition with milestone dates, especially if responsibilities are divided among different team members.

Examples:

- September 1: Data manager** – Send public facing spreadsheet to communications lead for review
- September 2: Communications lead** – Complete review and send final spreadsheet and announcement text to web manager for upload
- September 3: Web manager** – Upload spreadsheet and update competition website with final text

What metrics should the competition evaluate?

As outlined in [The Competition Guide Chapter 5: Keep Score](#), metrics associated with competitor progress can be based on participation, improvement, or overall achievement, depending on the goals of the competition and your preferred method of recognition. Possible metrics include:

- Change in weather-normalized source or site EUI (kBtu/sf)
- Change in water use intensity (kGal/sf)
- Change in greenhouse gas emissions (MtCO₂e)
- Change in ENERGY STAR score or highest ENERGY STAR score – Only use this if all competitor buildings are eligible to receive an ENERGY STAR score.

EPA used **change in weather-normalized source EUI** during the National Building Competition because all buildings can generate a weather-normalized EUI value by entering building energy use and square footage into Portfolio Manager. This approach allowed the greatest range of building types to participate.

Competition teams should use discretion in choosing between total EUI reduction and percentage EUI reduction as evaluation metrics. Teams should base their choice on the buildings participating in the competition and work as much as possible to make sure that one subset of competing buildings doesn't have a built-in advantage over another. In past year-long competitions, EPA has used **percentage reduction in EUI** as the evaluation metric because it prevents buildings with extremely high EUIs from having an unfair advantage. For example, a building that starts a competition with an EUI of 300 and reduces that EUI by a third (100) over the course of the competition year would beat a building that starts out with an EUI of 150 and cuts EUI by half (75) throughout the competition. However, in competitions shorter than a year, it may make sense to use reduction in total EUI as the evaluation metric to prevent buildings that undergo substantial retrofits during the short competition period from having an unfair advantage over those implementing behavioral energy efficiency measures.

STAGE 2: REGISTRATION — PREPARE FOR DATA COLLECTION

After identifying the metrics you want to collect and evaluate for the competition, the next step is to set up a custom data request within Portfolio Manager. This is the easiest way to collect dozens of performance metrics for multiple competing buildings at once. Data requests also maintain competitor data security and confidentiality: they provide the receiving account with a

snapshot of annual metrics evaluated in the competition – not whole property or meter records or individual bills.

Discuss with your team and agree upon the metrics you'll use to evaluate each competitor's submission in Portfolio Manager before publishing the

How to Request Data from Portfolio Manager Users



Figure 3: [Review the How to Set Up a Data Request training video.](#)

data request. **Once you publish the data request, the metrics you've requested are final. You cannot EDIT the metrics in the data request once it's been published.**

The metrics you collect will be used to determine the competition winners. Metrics collected for the National Building Competition included:

- Portfolio Manager Property ID*
- Property Name*
- Primary Property Type*
- Address*
- Property Floor Area (ft²)*
- Property Floor Area – Parking Garage (ft²)*
- Site Energy Use (kBtu)
- Site EUI (kBtu/ft²)
- Weather Normalized Site EUI (kBtu/ft²)
- Source Energy Use (kBtu)
- Source EUI (kBtu/ft²)
- Weather Normalized Source EUI

** Indicates a metric that can be included in the initial registration Custom Data Request for shorter competitions.*

TIP!

Are your competitor buildings already shared with one Portfolio Manager account?

If so, it may be easiest to **create a group** that only includes competing properties, and then run reports on that group periodically to evaluate progress.

Remember, if you go this route, you should still identify the best contacts for each building, in case any questions arise!

TIP!

Portfolio Manager Property ID is the best way to track buildings.

A building can be easily renamed within Portfolio Manager, but unless the building is entirely deleted and recreated, the Portfolio Manager Property ID will always stay the same.

As discussed in “Which metrics do you need to collect to evaluate data?” in Stage 1, it’s also important to collect metrics that will help you troubleshoot issues that may arise. Your success metric may be based on weather-normalized source energy use intensity (EUI), but there are many other fields that are useful to know in assessing whether a building’s reported change in EUI was caused by factors other than energy-saving efforts. For example, if all the competing properties are k-12 schools, information such as number of personal computers, whether or not the school is open on weekends, and if any energy is used for cooking could all be collected to help identify possible issues.

Once the report is published, share the unique URL with competitors to direct them straight to Portfolio Manager to submit their data. Depending on their level of familiarity with Portfolio Manager, competitors may need additional instructions or assistance. EPA has several resources available that you may want to provide to your competitors, including a PDF on [How to Respond to Data Requests in Portfolio Manager](#), as well as a short video showing the process being completed in Portfolio Manager (<https://www.youtube.com/watch?v=dqfzoCGIIDc>).



How to Respond to Data Requests in Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Portfolio Manager provides the ability for organizations wishing to collect data from a variety of individuals to develop and use a custom Data Request within Portfolio Manager. You may receive Data Requests from other users or organizations to provide property or portfolio data as part of a program or initiative. Each request includes a link that takes you to Portfolio Manager and provides instructions for completing the Data Request.

This process is often used in jurisdictions where there are voluntary benchmarking programs or mandatory benchmarking and transparency policies.

Responding to a Data Request is different than sharing a complete property record with a contact, because when you respond to a Data Request, you release only the information specified in the data request template.

Follow the steps in this document to respond to a Data Request.

Process for Responding to Data Requests

1. Access the request.
2. Prepare a response.
3. Preview the response.
4. Submit the response.

1 Access the Request

When another Portfolio Manager user sets up a data request, they will provide a link to access the request. The link may be provided via email, guidance document, or posted on a public website.

Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page. Once you have initially accessed the data request by clicking on the external link, the data request will always appear within your Portfolio Manager account in the **Reporting** tab and can be accessed here at any time in the future.

Figure 4: Send your competitors instructions on [How to Respond to Data Requests](#).

PHASE 2: DURING THE COMPETITION

STAGE 3: DATA CHECK-IN — REVIEW DATA

Depending on the duration of your competition, you may want to establish one or more data check-ins. During year-long competitions, EPA found that a “mid-point check-in” was valuable for both keeping competitors engaged, and creating an opportunity for EPA to review data issues and resolve problems that may otherwise have kept competitors from successfully completing the competition. Additional check-ins may save effort at the end of the competition, but always consider the additional time and resources needed for each check-in.

For the final data request at the end of your competition, request both the baseline data (again) and the final data. Some competitors may update their building data after they submit their buildings into the competition, so requesting the baseline data again will ensure that you have the most up-to-date data.

Prepare data for analysis

- Find your competition data request in the Reporting tab of the Portfolio Manager account you used to issue the request.
- Once all competitors have submitted, close the request so the data cannot be changed.
- Download the responses in Excel.
- Save the data in a separate spreadsheet (with a clear, descriptive filename) that can be referenced later if there are questions about the originally submitted data.
- If you’re using EPA’s template Competitor Data Tracker spreadsheet, paste the data request results into the DATA REQUEST tab. Make sure you first delete the example data and headers from the Competitor Data Tracker, and include the headers from your data request instead. Only make changes to this tab by copying and pasting in newly released information from competitors.

EPA’s template Competitor Data Tracker spreadsheet

EPA has provided a [template Competitor Data Tracker spreadsheet](#) (hereafter referred to as the Competitor Data Tracker) so you don’t have to build a spreadsheet to collect, quality control, and analyze competition data from scratch.

You do not have to use the spreadsheet to analyze your data, but it is a good starting point to identify winning properties in each building-type category.

The spreadsheet contains:

- A **COMPETITION SETUP** tab contains instructions for using the spreadsheet, and allows you to select the Baseline and Final period ending dates, as well as your winning evaluation metrics for energy and water.
- A **DATA REQUEST** tab, which is where you’ll copy and paste the data from Portfolio Manager that you receive in response to your data request.
- An **ALERTS AND METRICS** tab containing formulas that identify potential data issues in the information pasted into the Data Request tab, and calculates changes in evaluation metrics, identifying those properties with the top reductions that are eligible for recognition.
- An **ENERGY WINNERS** tab and a **WATER WINNERS** tab which displays properties that achieved top reductions for each building type.
- An **ALL RESULTS** tab that serves as a starting point to gather competition data to release publicly.

TIP!

Setting a mid-point check-in?

If you’re using the Competitor Data Tracker and want to have a “mid-point check-in” during your competition period, simply replace the Final Period Ending Date on the COMPETITION SETUP tab with the mid-point check-in date.

Data in Portfolio Manager is self-reported, and inevitably there will be mistakes in utility data entry or building information. As a result, it's critical to fully check the submitted data for errors and discrepancies. In addition, you may want to consider requiring presumptive winners to have their building energy and water data verified for accuracy by a Licensed Professional, as EPA required for the National Building Competition.

- **Take time to standardize your data.** Depending on the size of your dataset, it may be reasonable to set up a macro to scrub your data. Check for accuracy and consistency in fields such as state abbreviations and organization names.
- **Distinguish between baseline and final data.** Throughout the Competitor Data Tracker, EPA uses a formula to append a "-B" or "-F" to the end of the Property ID number, based on the year-end data date indicated in the COMPETITION SETUP tab. The "-B" indicates a building's baseline data, while the "-F" indicates final data. The Property ID is the appropriate spot for the formula because each building receives a unique and unchanging Property ID number.
- **Use the Data Quality Checklist.** Review the most common issues that require follow-up below.

Examples of results that may exceed reasonable ranges:

- An EUI above 1,000 kBtu/ft² is much higher than normal for most property types (except data centers).
- Though possible, an EUI reduction greater than 30% is an abnormally large reduction for a typical annual competition.
- An EUI reduction greater than 10% is abnormally high in a competition that lasts three months.
- An EUI of below 20 for any property type is significantly low.

For additional examples, check the [U.S. National Median EUI](#) technical reference to see typical values for various metrics.



Data Quality Checklist

- Are any energy and/or water issues detected?**

Do the changes between baseline data and final data fall outside of an expected range?

This result doesn't automatically indicate an error, and it's possible that all your winners will be flagged in this check ... but so will buildings that have data input errors, so it's important to follow-up. Set a limit of reasonable ranges and check your data for any values outside of the expected ranges.

Remember, the ranges of reasonable EUI reductions will change depending on the duration of your competition. A 25% reduction in annual EUI over a yearlong competition is more reasonable than the same percentage reduction in annual EUI over a 3-month period.
- Is there an ending date issue?**

This alert flags if the property's reporting period end date doesn't match the date specified for the baseline or final period ending date. If it doesn't, it could mean that those properties need to update their utility information before they can submit their data via the data request.
- Are there any floor area issues?**

Has the floor area been reported? Does the reported baseline square footage match the final square footage? If not, this result could indicate a part of the building has been under construction, closed, or was sold. This possibility requires follow up to ensure the building was operating under normal circumstances throughout the competition.

In EPA's National Building Competition, if it came to light that a building was under construction during the competition period, the building was no longer eligible for EPA recognition.

- Do all the competition metrics calculate?**

"Not Available" values in the data indicate that metrics cannot be calculated based on the data available in Portfolio Manager. They may require follow up with the competitor, depending on the metric and the situation.

The ALERTS AND METRICS tab contains alerts that will flag properties where the evaluation metric you chose for the competition cannot be calculated. In such cases, the properties will either be disqualified or will require follow up from the competition host and additional effort from the competitor to correct the underlying data issues and re-release the correct data.

Entering a new fuel type (for example, if the building begins using fuel oil during the competition) may also prevent weather-normalized metrics from calculating until at least one year of data has been entered, making those metrics unavailable in the building's data release for the competition. Find additional examples in this FAQ: ["Why is My Weather Normalized EUI "N/A"."](#)

The steps outlined in [Stage 3](#) should be repeated for each data check-in during your competition.

TIP!

Use a "Withdrawn" column.

During the course of any competition, participants may ask to withdraw, or simply may not submit final data. In your Competitor Data Tracker spreadsheet, manually keep track of when a competitor requests to withdraw from the competition by entering an "x" next to the corresponding property.

Basic Info				Alerts				
Property ID	Property Name	Primary Property Type – EPA Calculated	BASIC INFO	Water Competitor?	Floor Area Issue?	Ending Date Issue?	Energy Metric Calculation Issue?	Water Metric Calculation Issue?

Figure 5: Headers on the ALERTS AND METRICS tab of the Competitor Data Tracker.

STAGE 4: CONTACT COMPETITORS ABOUT DATA ISSUES

As you identify issues, you'll need to reach out to the appropriate contact for the building.

When you contact a competitor with data issues, sometimes all you need is a quick confirmation that the data is valid, despite being out of the ordinary. For example, drastic energy-saving steps could've been taken during the competition period, prompting a large drop in energy use; or the square footage was originally entered incorrectly, and then fixed for the final submission.

Other times, issues will require competitors to resubmit their data using the Custom Data Request link. Fortunately, the data request output has a "Date Generated" and "Date Submitted" field for each line, so it's easy to check when a competitor submitted the most recent data for a property.

When planning the timing of your competition, it's important to realize that the cycles of outreach and resubmission can be the most time-intensive step of the competition as you investigate issues, potentially identify additional problems, and resolve them. As the Data Manager, this effort will be significantly easier and faster if you're comfortable with both Portfolio Manager and Microsoft Excel.

Generate personalized spreadsheets detailing competitor data issues

If you're using the Competitor Data Tracker, you can filter the spreadsheet by each individual building contact and send him or her the alerts that are triggered for each of their buildings. Depending on their level of Portfolio Manager experience, a competitor may find it helpful to have a separate INSTRUCTIONS tab accompanying their data issues spreadsheet (see an [Example INSTRUCTIONS tab](#) in the Appendix).

TIP!

Need help troubleshooting?

Let competitors know that the [Data Quality Checker](#) is available on the Summary tab of each property in Portfolio Manager. If they choose a 12-month period for the Data Quality Checker to examine, it'll return a list of possible issues.

TIP!

Did you decide not to use a custom data request to collect data submissions?

If competing buildings shared data with a central Portfolio Manager account, it won't be necessary to have anyone resubmit their data! Any report that you run in the account will always capture the latest data. It's important though to ensure that all competitors have updated their data before you review it.

PHASE 3: AFTER THE COMPETITION

STAGE 5: IDENTIFY & VERIFY POTENTIAL WINNERS

After the data issues are resolved, or the deadline for resolving data issues has passed, it's time to identify potential winners. Use the guidelines you set at the beginning of the competition to determine which buildings may be eligible for recognition.

In the Competitor Data Tracker, the ENERGY WINNERS and WATER WINNERS tabs have formulas that identify the properties with the largest reductions in whatever evaluation metrics you selected on the COMPETITION SETUP tab. Once the final competition data has been submitted, these formulas will show the property that has reduced the most within each property type for energy and water. If you want to award other winners, such as Top 5 in a category, or all properties that reduced by 20% or more, you can find this information by sorting the appropriate columns in the ALERTS and METRICS tab.

To receive recognition in EPA's National Building Competition, all potential winners were required to submit a data verification form, signed and stamped by a licensed professional – a Professional Engineer or Registered Architect. Here you can access and customize a [template energy data verification form](#) used in the National Building Competition.

Another way to verify data is by requesting that winners generate [statements of energy performance](#) and [data verification checklists](#). Competitors can generate these items in the Reporting tab of the Portfolio Manager account for their winning properties. The generated documents can be checked and signed by a third party and sent to the competition manager. You can manually keep track of a property's verification status in the Verification Table in the ENERGY WINNERS and the WATER WINNERS tabs.

TIP!

For some property types, seasonal variation in energy use is typical and considered "normal operation."

For example, K-12 schools are often largely vacant during summer vacation, so a reduction in energy use during the summer is considered typical for this property type.

Why verify?

If you're co-branding your competition with ENERGY STAR, you'll be required to have a Licensed Professional verify your competitor data. Even if you're not co-branding your competition, verification may be useful. Occasionally, the verification step may reveal reasons why a building is ineligible for recognition. A licensed professional may also discover issues that wouldn't be caught in a data quality check. For example, if the property was vacant for part of the competition baseline or performance period, this building was not in "normal operation." The licensed professional may find that the energy use was not metered properly for the full competition period, or that additional energy consumption unrelated to the building's regular operation—from construction activity, for example—was captured by meters during the baseline period. Or, you may identify simple data entry errors (such as typos) that impact the final results.

STAGE 6: PREPARE PUBLIC RESULTS

After winner data has been verified, depending on the recognition your organization is offering, you may want to make the competition data public. At this stage, competitor privacy should be an important consideration. The ALL RESULTS tab is a starting point that includes basic property information and change metrics, but some competitors do not want their sensitive data, such as address, floor area, or total energy usage, published publicly.

In addition to respecting these privacy concerns, the Competitor Data Tracker is likely too complex for a public audience to understand quickly. There may be too many tabs, formulas, and data checks embedded in this spreadsheet for the average user. So as a final step, you may wish to create and distribute a polished public-facing spreadsheet, similar to the one released by EPA following the National Building Competition ([public-facing spreadsheet](#)).

Create a public-facing spreadsheet

- Remove information from competitors who will not be recognized as winners in any category from your Competitor Data Tracker.
- Ensure that the only metrics you are publishing are those used to determine the winners (i.e., weather-normalized source EUI, indoor water Intensity, etc.).
- Edit to standardize capitalization, punctuation, and abbreviations. Consider conducting a final review of the entries at this point to triple check your calculations, ask clarifying questions, and polish up spelling, grammar, and consistency.

After you create your public-facing spreadsheet, you can also share it with whomever is tasked with communications to create PR materials, such as a website announcement, press release, blast email, or social media graphics, to spread the word about your organization's energy-saving accomplishments!

When the competition is complete, congratulations are in order — not only for the winners and competitors, but also for you, the Data Manager. Your role may happen largely behind the scenes, but it's critical to the success of the competition and the energy savings that your organization achieves. Take time to celebrate with your team, reflect on your successes, and identify ways you can apply this experience to future energy-efficiency competitions! Thank you for doing your part to help reduce energy waste, save money, and protect the environment for future generations.

APPENDIX

Example INSTRUCTIONS Tab for personalized data issues spreadsheet

Note: The Portfolio Manager data request URLs are placeholders and will not direct to a live data request.

[Download as an Excel spreadsheet from the Tools & Resources library.](#)

Instructions

This tab provides a key to all errors that could occur in the data you submitted to the **[NAME OF YOUR COMPETITION]**.

Please note that prompt action is essential for your building(s). If you identify an error in your building data, please resubmit corrected data using the below link no later than [_____]. If you have any questions, please contact us at [_____].

For best results, copy and paste the below Reporting link into your browser.

[<https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/xxxx>]

Floor Area Issue?

This column checks that Portfolio Manager can calculate a value for Property Floor Area, and checks to see if the floor area of a property has changed by a large amount. Please check your Property Use Information in Portfolio Manager to ensure you have input floor area that covers both competition periods; make any corrections if required. Resubmit any updated building data using the reporting template at the top of this page. If you believe the change in floor area to be correct, please contact us at [_____].

Ending Date Issue?

This column checks that all energy meters are current through **[END OF COMPETITION PERIOD]**. Please ensure that all energy meters for your property have complete data through **[END OF COMPETITION PERIOD]**. Resubmit any updated building data using the reporting template at the top of this page.

Energy Metric Calculation Issue?

This column checks that a **[WINNING METRIC, e.g., *Source Energy Use Intensity*]** value can be calculated for both competition periods in Portfolio Manager. Please double check that energy data has been entered for the building through **[END OF COMPETITION PERIOD]** for all meters and that no single meter entry spans more than 65 days. Resubmit any updated building data using the reporting template at the top of this page.

If you are unsure why you are receiving this error, please contact us at [_____].

Water Use Intensity Cannot be Calculated

This column checks that a **[WINNING METRIC, e.g., *Source Water Use Intensity*]** value can be calculated for both competition periods in Portfolio Manager. Please double-check that water data has been entered for the building through **[END OF COMPETITION PERIOD]** for all meters. Resubmit any updated building data using the reporting template at the top of this page.

Example energy data verification form

Note: EPA used a mail merge to fill in the property information before sending to competitors.

[Download as a Word document from the Tools & Resources library.](#)

To receive recognition in the competition for the building listed below, please verify the data as requested, complete steps 1–6 of the form, and submit it to the competition team by [DUE DATE].

Note: If there was any vacant space or construction during the competition period, this building may not be eligible to receive recognition. EPA used a mail merge to fill in the property information in green brackets below before sending to competitors

Step 1: Verify building name

Portfolio Manager Property ID: [1234567]

Property Name: [Example Property Name]

(This is the name that will be used on the recognition certificate and in public-facing materials)

Yes, this is how the property name should appear on the recognition certificate and in EPA outreach materials.

No, this is incorrect. I would like the name of the revised property to be listed as:

Correct Property Name [\(Click here to enter text.\)](#)

Step 2: Verify building address

Property Address: [Street Address, City, State, Zip]

Yes, the building address is correct.

No, this is incorrect. I have corrected the address in Portfolio Manager to read:

Correct Property Name [\(Click here to enter text.\)](#)

Step 3: Verify gross floor area: [30,000] square feet

The square footage must include all supporting functions, such as kitchens and break rooms used by staff, storage areas, administrative areas, elevators, stairwells, atriums, vent shafts, etc.

Note that existing atriums should only include the base floor area that they occupy. Interstitial (plenum) space between the floors should not be included in the total.

Finally, gross floor area is not the same as leasable space. Leasable space is a subset of gross floor area.

Yes, this is correct.

No, this is incorrect. I have added and/or corrected this data in my Portfolio Manager account, and resubmitted my property data using this link:

[\[https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/xxx\]](https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/xxx)

Step 4: Verify meter data

Verify that each energy meter entry that appears in Portfolio Manager for the baseline and competition periods [START DATE to END DATE] is correct and matches the actual meter readings as reported by the utility.

Also verify that ALL energy use associated with this property is represented in Portfolio Manager, that no meter is shared with another property, and that the property was operating business as usual throughout the competition period.

Yes, all meters are represented and all entries are correct.

No, one or more meters, or meter entries, is incorrect or missing. I have added and/or corrected them in my Portfolio Manager account, and resubmitted my property data using this link:

[\[https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/xxx\]](https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/xxx)

Step 5: Signature & Stamp of Professional Engineer or Registered Architect

I certify that the information contained on this form is true and accurate to the best of my knowledge.

Name: _____ Date: _____

Signature: _____



Step 6: Submit

Please email a saved or scanned version of this document, in PDF format, with the subject line “[Organization Name] Competition Verification Form.”

Please do not send directly from the scanner. If this is a hardship, please contact us to make other arrangements.