ENERGY STAR® HIGHER EDUCATION BENCHMARKING INITIATIVE INSTRUCTIONS

The simple choice for energy efficiency.

July 2022

Overview

The U.S. Environmental Protection Agency's ENERGY STAR® Higher Education Benchmarking Initiative (HEBI) provides an opportunity for colleges and universities to understand how the energy and water performance of their campus buildings stack up against that of peer institutions. EPA hopes that the initiative sparks dialogue and action on energy and water efficiency opportunities. All 2- and 4-year colleges and universities in the United States and Canada are invited to participate, receiving a free scorecard from EPA showing how their campus performance compares against peers. Participant data will be anonymized to ensure privacy and will not be shared outside of EPA.

What will you need to do?

Participation requires you to provide some information about your campus characteristics through a Supplemental Survey, as well as campus-wide energy and water use data for the **2021 calendar year.** Water use data is optional. Energy and water use data will be collected through ENERGY STAR Portfolio Manager® using the Property Share feature. Portfolio Manager is an online benchmarking tool that is free to use and ensures data privacy.

When you are ready to submit, it is best practice to use the Data Quality Checker featured in Portfolio Manager to help identify possible data entry errors. Upon submission, all campus data will be reviewed for possible inaccurate or outlier data. Participants with identified errors will be contacted to correct the data. Data that is not corrected will be excluded and a scorecard will not be created for that institution or campus. **Submission deadline is September 1, 2022.**

What will you need to include?

For the purposes of this initiative, the EPA defines a campus boundary as a geographically contiguous collection of buildings that function as a single property and that include a variety of building types typical of a college or university. Please do NOT submit data at scales or granularities other than "campus." For example, participants should **NOT** submit:

- Individual building-level data

- Groups of buildings that lack the variety of building types typically found at a "College/University"

- Institution-level data in the case that the institution consists of multiple campuses

Your submitted gross floor area (GFA) should include all classrooms, laboratories, offices, cafeterias, maintenance facilities, arts facilities, athletic facilities, and residential areas.

The usage data and GFA you submit should meet the definition of a "College/University" and be as complete as possible in representing the total of your campus buildings. Keep in mind that the level of data completeness directly affects how meaningful the results will be for you and your peers.

NEW! This year, participants have the option to submit isolated data for **residential buildings** on campus. Provided sufficient responses are received, a performance comparison for residential building data against that of other submitters will be provided. Residential building data will be submitted separately from campus data. Details on each submission process are outlined below.

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1 — Preparing Your Data in ENERGY STAR® Portfolio Manager®

Please note that if you plan to submit multiple campuses you will need to conduct the following steps for each individual campus.

Campus-Level Data

To compare institutions at the same scale, EPA needs all participants to submit data at the **campus-level**. A "campus" is defined as a collection of two or more buildings that function as a single, cohesive property with a single, shared primary function. The campus-level property that you submit should represent all campus building floor area, energy use, and water use.

- **DO** include buildings that the institution leases where consumption data is available and that are located on campus, like auxiliary student housing.

- **DO NOT** submit energy and water data for individual buildings that your institution owns but that are located outside of the campus boundary, such as an office building located in a downtown area when the rest of campus is rural and geographically separate.

- You can submit more than one campus to participate in the HEBI, but you will need to create a new campus-level property and complete a separate Supplemental Survey for *each* submission.

- Differentiate each campus using a property name that clearly describes what the campus boundary represents. For example: "Anywhere University," University of Anywhere – City, State," "University of Anywhere - Downtown Campus."

Residential Building Data (Optional)

We welcome participants to submit an additional campus consisting exclusively of student residence hall buildings. If enough data is submitted, a performance comparison for residential building data against that of other submitters will be provided. **Note:** Student residence hall buildings should still be included as part of the main campus submission if they are present on campus.

When naming the residential building campuses in Portfolio Manager, please follow the naming convention outlined above for campuses, but add "_RES" to the end of the Property Name (i.e., the residential building submission for "Anywhere University" should be named "Anywhere University_**RES**"). The name you enter here should match the campus name in Portfolio Manager.

2 — Getting Your Data Ready in ENERGY STAR® Portfolio Manager®

The following guidance and referenced materials describe how to properly benchmark your institution's energy and water use data to participate in the HEBI. All participants should ensure that their data submission aligns with the instructions below prior to sharing their data via Portfolio Manager.

Please note that if you plan to submit multiple campuses you will need to conduct the following steps for each individual campus.

Step 1: If you are new to the tool, create a Portfolio Manager account. Otherwise skip to Step 2!

Go to www.energystar.gov/portfoliomanager and login if you have an existing account or, if not, register for a new account. Once your account is set up, you are ready to prepare your campus-level energy and/or water data for the HEBI.

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Step 2: Set up your Campus-Level Property (Referred to as a "Parent Property" in Portfolio Manager)

Note: Since we will only be assessing performance at the campus-level, **please complete step 2 even if you are already benchmarking some or all your campus buildings at the individual building level**. You will be able to associate any buildings already in Portfolio Manager and their energy/water meters to the new campus-level property after it is created.

- How to Benchmark a Campus: This six-page guide provides the general steps for benchmarking multi-building properties, commonly referred to as campuses, in ENERGY STAR® Portfolio Manager® and includes instructions on adding a child to the parent property.

- Remember to give your campus or residence hall a descriptive name as outlined on page 2 so it will be clear to you and EPA what institutional boundary and campus property it represents.

- In the "**Building Use**" section of the "**Set up a Property: How is it Used?**" page, the only field required for the purposes of the HEBI is "**Gross Floor Area**."

  Note: Any change in GFA values will only have an impact if something changed during the period for which metrics are being run. For example, since we are looking at 2021 data, make sure that 'current as of' values are accurate for all of 2021. Remember to account for changes in GFA if a building opened or was demolished in 2021.

- When adding child properties to your parent property, remember that GFA from child properties does not automatically roll up to the campus level. If you make changes to a child property's GFA, update the parent property to reflect these changes as well.

> **HELPFUL TIP**
>
> Portfolio Manager provides a diagram allowing you to see how child properties relate to the parent property, as well as how child property-level meters contribute to campus totals. To view the diagram, click "View as a Diagram" on the property's Summary, Details, or Meters tab.

Step 3: Enter Energy and Water Use Data

After creating your campus-level property, referred to as a parent property by Portfolio Manager, enter your energy and water use data.

- Follow steps 3 & 4 in the How to Benchmark a Campus document to create utility meters, add utility data, and identify meter configurations and associations.

- For more information about how to add meter data in Portfolio Manager, please view the guide How to Get Utility Data Into Portfolio Manager.

Step 4: Sharing your Campus(es)

Add RE Tech Advisors as a contact. RE Tech Advisors is providing data support for the ENERGY STAR HEBI.

1. After logging into your Portfolio Manager account, click "**Contacts**" in the top right corner.

2. Click "**Add Contact**" and search for "jdmwebservices" in the Username field. Click "**Connect**." *Once your connection request is accepted,* enable sharing with RE Tech Advisors

3. From the main menu, click the "**Sharing**" tab. Then click "**Set Up Web Services/Data Exchange**."

a. Under heading, "**Select Webservices Provider (Account)**," select "**RE Tech Advisors Webservices (JDMWebservices)**" from the drop-down menu.

b. Under heading "**Select Properties**," select all properties applicable to HEBI from drop-down menu.

c. Under heading "**Choose Permissions**," select "**Bulk Sharing (Simple Option)**" & "**Exchange Data Read Only Access**." Then click "**Authorize Exchange**."

4. If applicable, a screen may appear asking to "Agree to Terms of Service on Behalf of…" Please authorize all options presented.

5. You will see a green success message if all properties have been shared correctly.

For more general information on property sharing, review the How to Share Properties with Other Portfolio Manager Users resource but please ensure that the above instructions are followed.

Submission Checklist

The checklist below outlines all information necessary to participate in the ENERGY STAR HEBI. Please keep in mind that data completeness and accuracy are important to the analysis process, allowing more meaningful and informative results for all.

☐ **Prepare Your Campus-Level and Residential Building Data in Portfolio Manager**
  o Review guidance section 1 above, "Preparing Your Data in ENERGY STAR® Portfolio Manager®."
  o Differentiate each campus and residence hall using the outlined naming conventions.
☐ **Get Your Data Ready in Portfolio Manager and Submit**
  o Ensure your campus-level and residential building data in Portfolio Manager align with section 2 above, "Getting Your Data Ready in ENERGY STAR® Portfolio Manager®."
  o Run the Data Quality Checker to review your data for potential entry errors.
  o Visit the ENERGY STAR® Portfolio Manager® Help Desk to learn more about the platform, contact support, and access additional resources.
  o Submit your data using Portfolio Manager's Property Share feature outlined in step 4 above.
☐ **Submit Your Supplemental Survey**
  o Complete the Supplemental Survey for each campus/submission to help us gather additional information needed for the data analysis process.

Please contact us with any questions!

Visit the ENERGY STAR® Portfolio Manager® Help Desk to learn more about the platform, contact support, and access additional resources.
For more information on the HEBI, contact Brendan Hall, U.S. EPA Commercial Buildings Program, Higher Education: Hall.brendan@epa.gov

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