



EECBG Portfolio Manager Initiative  
Program Launch Webcast

September 6, 2011

Joel Blaine, U.S. Department of Energy  
Sara Lisauskas, ICF International

# What is TAP?

DOE's Technical Assistance Program (TAP) supports the Energy Efficiency and Conservation Block Grant Program (EECBG) and the State Energy Program (SEP) by providing state, local, and tribal officials the tools and resources needed to implement successful and sustainable clean energy programs.



## TAP offers:

- One-on-one assistance
- Extensive online resource library, including:
  - Webcasts
  - Events calendar
  - TAP Blog
  - Best practices and project resources
- Facilitation of peer exchange

## On topics including:

- Energy efficiency and renewable energy technologies
- Program design and implementation
- Financing
- Performance contracting
- State and local capacity building

Access the TAP Blog!  
<http://www.eereblogs.energy.gov/tap/>

Provides a platform for state, local, and tribal government officials and DOE's network of technical and programmatic experts to connect and share best practices on a variety of topics.

**Technical Assistance Program Blog**

U.S. DEPARTMENT OF ENERGY Energy Efficiency & Renewable Energy

### Local Energy Rebate Programs

June 11, 2010 11:19 | Comments (1)

**Maggie from Florida asks:** Anyone implement an energy rebate program at a local level? Is it being managed by staff or was it contracted out competitively? Any advice on how to best implement/manage such a program?

**The TAP Team responds:** There are quite a few good examples of energy programs offered at a local level that offer rebates, technical assistance and other incentives. A few of these include the following:

- The City of Charlottesville and Albemarle County in Virginia jointly formed the Local Energy Alliance Program (LEAP) which is creating and administering energy efficiency (EE) programs for the residential sector. The Southeast EE Alliance (SEEA) seed funded the creation of LEAP in 2009 and the county and city have each allocated EECBG funds for LEAP to take programs to scale. They are currently working on rebates, incentives, and a local contractor network to deliver services to the residential sector. LEAP site: [www.leap-va.org](http://www.leap-va.org)
- The town of Babylon, New York has rolled out the Long Island Green Homes Program in which residents can make energy efficient improvements to their homes at little or no cost and without assuming new debt through some innovative municipality-based financing initiatives. <http://www.townofbabylon.com/subsitemenu.cfm?id=252>
- The Cambridge (Massachusetts) Energy Alliance is a not-for-profit organization created to save residents money, while reducing Cambridge's carbon footprint. The Alliance is working with homeowners, businesses and institutions across the city to achieve unprecedented levels of energy savings and to expand clean energy sources. They offer:
  - Comprehensive energy assessments/audits for Cambridge buildings, generally for free
  - Up to 30% reductions in energy bills
  - Energy efficiency upgrades with no up front cash required
  - A one-stop energy solution with guaranteed quality
  - See: <http://cambridgeenergyalliance.org/>
- The ClimateSmart programs are run by the City of Boulder, Colorado's Office of Environmental Affairs. For information on Boulder's programs, see: [http://www.bouldercolorado.gov/index.php?option=com\\_content&view=article&id=1058&Itemid=386](http://www.bouldercolorado.gov/index.php?option=com_content&view=article&id=1058&Itemid=386)

The management of these programs varies. The municipalities listed above include both municipal staff tasked with running these programs and others that have an outside non-profit organization providing services on behalf of the municipality. There are other examples of municipalities that outsource these services to for-profit consulting firms (Charleston, SC is about to put out an RFP to hire one).

There is not one best way to go on implementing municipal EE programs. There are good reasons and justifications for each of these three models. If the municipality is

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**RELATED LINKS**

- Energy Information Center
- Office of Energy Efficiency and Renewable Energy
- Weatherization & Intergovernmental Program
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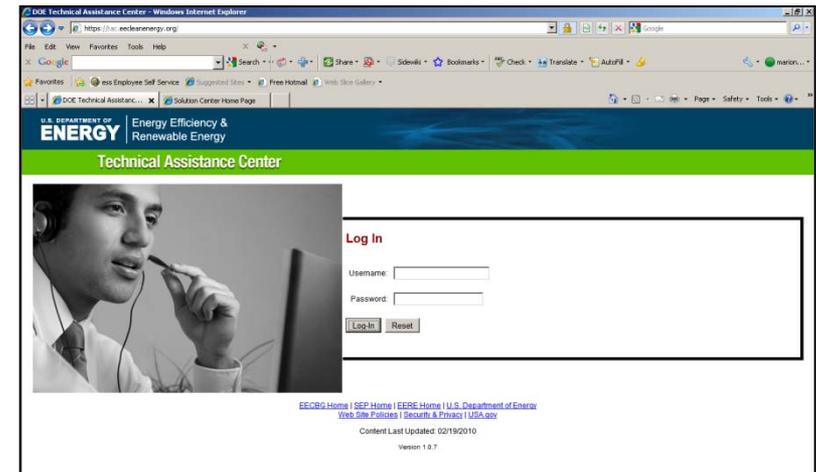
**META**

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## We encourage you to:

1) Explore our online resources via the [Solution Center](#)

2) Submit a request via the [Technical Assistance Center](#)



3) Ask questions via our call center at 1-877-337-3827 or email us at [solutioncenter@ee.doe.gov](mailto:solutioncenter@ee.doe.gov)



# FEEDBACK QUESTIONS:

There will be a short **questionnaire** immediately following this webcast. Please take a few minutes to complete these questions. Your feedback is greatly appreciated.

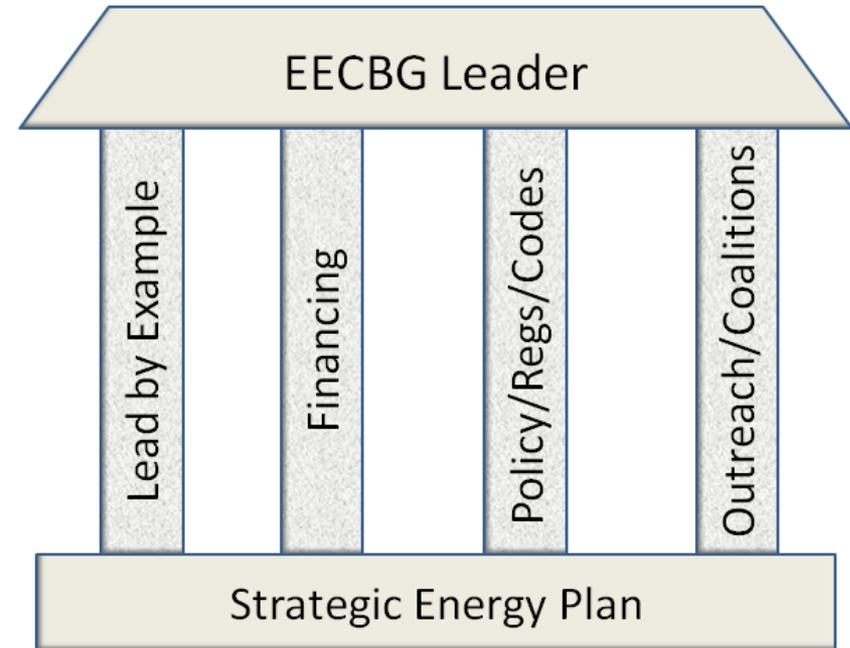
- **EECBG Portfolio Manager Initiative**
  - Joel Blaine, U.S. Department of Energy
- **Portfolio Manager Overview**
  - Sara Lisauskas, ICF International
- **Grantee Example:** Rick Sunday, County of Hidalgo, TX
- **Grantee Example:** Ryan Dicks, Pierce County, WA
- **Grantee Example:** Brendan Shane, Washington, DC
- **Next Steps**
- **Q & A**

# Introduction to the EECBG Portfolio Manager Initiative

Joel Blaine  
EECBG Project Officer,  
U.S. Department of Energy

## Traits of an EECBG Leader:

1. Leading by example (LBE)
2. Financing strategies
3. Policy/codes/regulations
4. Outreach and coalition building



Benchmarking is a **key** best practice in energy management

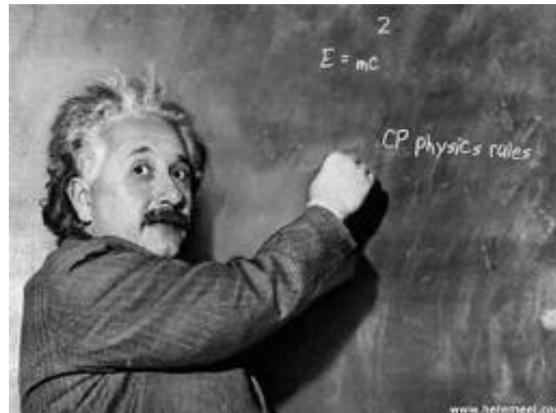
- Allows grantees to set and track progress towards goals
- Helps justify investment in energy efficiency
- Better positions governments to secure competitive grants or other financing for energy efficiency projects

*The U.S. DOE is providing an opportunity through the Technical Assistance Program (TAP) that offers EECBG grantees the chance to work with subject matter experts and collaborate with peers on energy benchmarking strategies.*

- Promotes comprehensive use of ENERGY STAR's benchmarking tool - Portfolio Manager
  - Benchmarking
  - Energy management
  - Reporting & Disclosure to the Public
- Provides Technical Assistance
  - Portfolio Manager Training (introductory and advanced topics)
  - Peer-to-Peer exchange opportunities
  - Technical Experts available through Office Hours and as-needed
- Offers customized assistance based on experience level

***This SUPER-support is offered for a limited time!***

- The initiative will offer a curriculum around best practices in energy management, which may include web trainings on:
  - Benchmarking in Portfolio Manager
  - Advanced Benchmarking in Portfolio Manager
  - Strategies for Successful Energy Management
  - Financing Energy Efficiency Upgrades with ENERGY STAR
  - Energy Disclosure and Leasing Standards: Best Practices
  - Communicating Success: Measuring Improvement, Sharing Results



# How do Grantees Participate?

- Submit the simple, one-page application by **October 7**
- The application requests basic information on current benchmarking activity, availability of energy data, and goals for the period of assistance

*Goals included in the application:*

Completed	Goal	
<input type="radio"/>	<input type="radio"/>	Benchmark buildings retrofitted with EECBG funds
<input type="radio"/>	<input type="radio"/>	Benchmark 1-5 buildings
<input type="radio"/>	<input type="radio"/>	Benchmark 5-20 buildings
<input type="radio"/>	<input type="radio"/>	Benchmark our entire portfolio of buildings
<input type="radio"/>	<input type="radio"/>	Create reports with benchmarking results
<input type="radio"/>	<input type="radio"/>	Identify and evaluate energy savings opportunities based on input results
<input type="radio"/>	<input type="radio"/>	Report benchmarking results to the public

EECBG & SEP TECHNICAL ASSISTANCE PROGRAM

**EECBG PORTFOLIO MANAGER INITIATIVE APPLICATION**

The Basics:  
 Name of Government: \_\_\_\_\_ Job Title: \_\_\_\_\_  
 Name of Benchmarking Contact: \_\_\_\_\_ Contact email: \_\_\_\_\_  
 Contact phone: \_\_\_\_\_

Benchmarking Information:

1. Is your state or local government currently tracking their energy use?  Yes  No  
If so, what systems are they using?
2. Does your state or local government have an energy reduction goal (i.e. 20% reduction by 2020)?  
 Yes  No  
If so, what is your goal?
3. How many publically-owned buildings does your state or local government currently operate?
4. List your Utility Providers (Fill in all that are applicable):
  - a) Electric Utility:
  - b) Natural Gas Utility:
  - c) Fuel Oil Provider:
  - d) Steam Provider:
  - e) Other:
5. In order to benchmark, you need at least one year of historical energy data for all fuels and basic facility information such as floor area. Is this information currently available?  Yes  No  
Would you be able to gather the data while you are receiving technical assistance?  Yes  No
6. Grantees can participate in the Portfolio Manager Initiative if they are just starting out with benchmarking, or if they are trying to take their benchmarking efforts to the next level. Of the activities listed below, please identify which steps your state or local government has already taken, and which would be appropriate as a goal between now and June 30, 2012. Indicate completed tasks and goals by marking an "X" in the chart below.

Completed	Goal	
<input type="radio"/>	<input type="radio"/>	Benchmark buildings retrofitted with EECBG funds
<input type="radio"/>	<input type="radio"/>	Benchmark 1-5 buildings
<input type="radio"/>	<input type="radio"/>	Benchmark 5-20 buildings
<input type="radio"/>	<input type="radio"/>	Benchmark our entire portfolio of buildings
<input type="radio"/>	<input type="radio"/>	Create reports with benchmarking results
<input type="radio"/>	<input type="radio"/>	Identify and evaluate energy savings opportunities based on input results
<input type="radio"/>	<input type="radio"/>	Report benchmarking results to the public

7. If applicable, please include any additional information about your interest in the EECBG Portfolio Manager Initiative.

RECOVERY.gov

- All participants will have an account manager, who will:
  - Schedule a kickoff call to discuss goals and initiative offerings
  - Hold regular check-in calls to monitor progress toward goals
  - Direct grantees to appropriate technical resources (materials, training webinars, technical experts, etc.)
- Participants will be assigned to a peer group
  - Groups will be based on experience level
  - Grantees will share best practices and lessons learned in web-based meetings
- Participants are encouraged to attend training webinars
- Participants are invited to Portfolio Manager demos and Q&A sessions

# Overview of Portfolio Manager Benefits and Capabilities

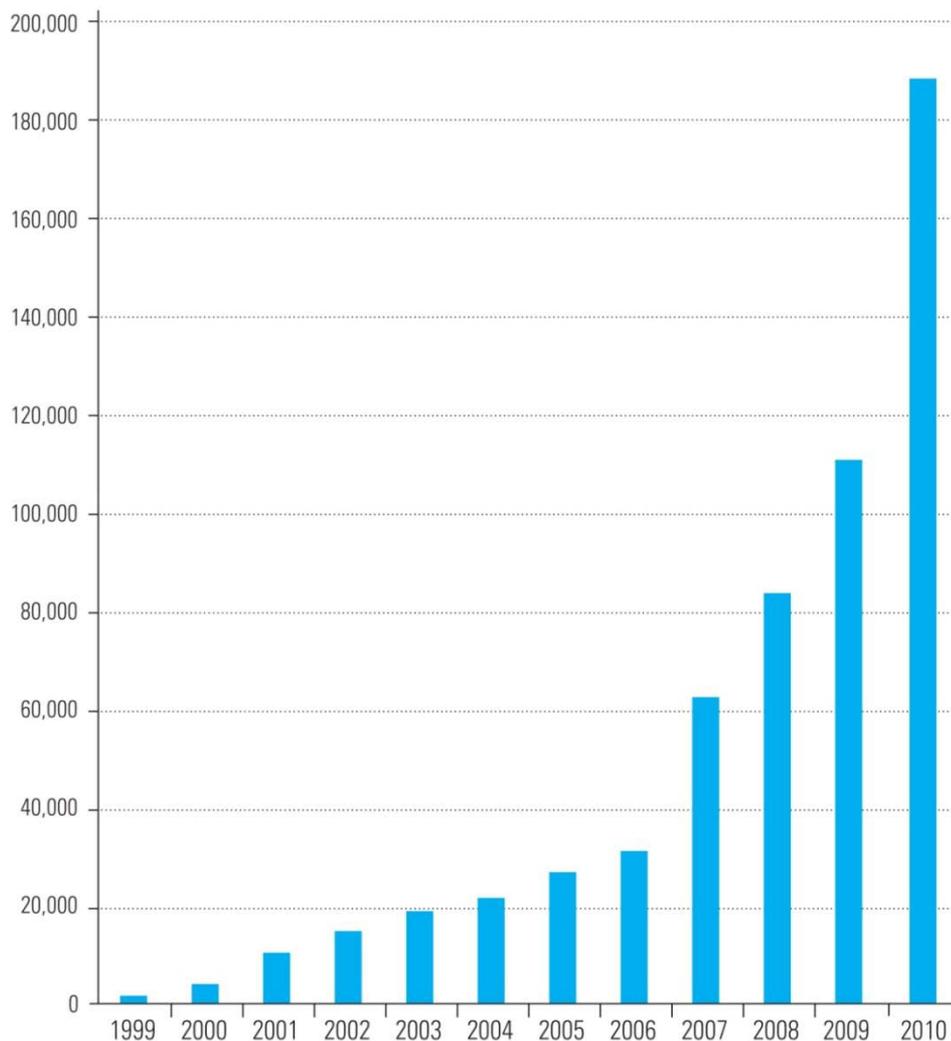
Sara Lisauskas  
ICF International

- Free, web-based tool for benchmarking existing buildings
- Provides benchmarks for all commercial buildings, including:
  - ENERGY STAR energy performance score (1 to 100) for eligible buildings, and
  - Normalized energy use intensities (EUI) for all buildings
- Facilitates applications for ENERGY STAR Certification and Leaders recognition

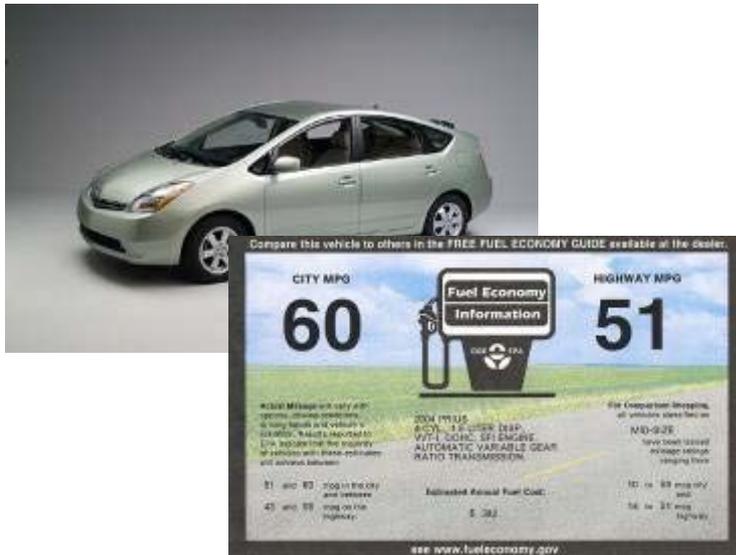
[www.energystar.gov/benchmark](http://www.energystar.gov/benchmark)

# Benchmarking Activity in Portfolio Manager Continues to Increase

Commercial Buildings Benchmarked (cumulative)

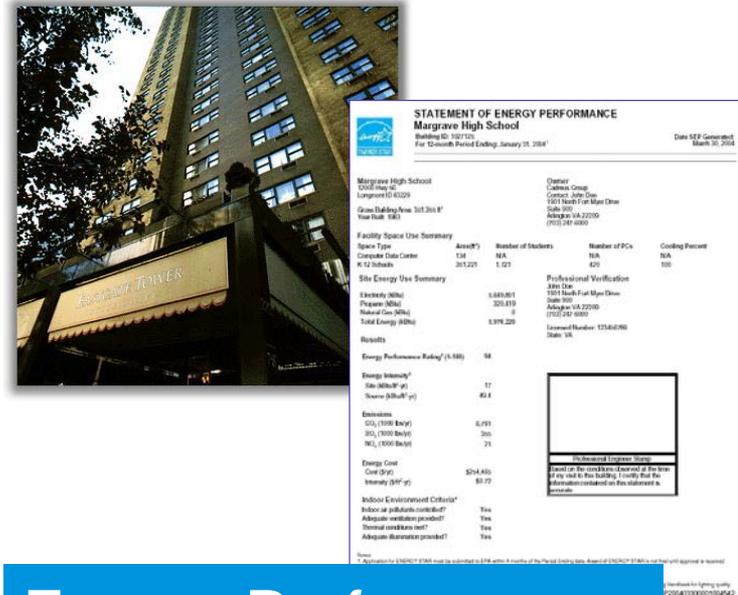


Is 60 MPG high or low  
for this automobile?



Fuel Efficiency:  
**MPG**

Is 90 kBtu/SF/YR high or low  
for this building?



Energy Performance  
Rating: **1 to 100**

# ENERGY STAR Score Eligible Building Types



**Bank/Financial  
Institutions**



**Courthouses**



**Data Centers**



**Dormitories**



**Hospitals**



**Hotels**



**Houses of  
Worship**



**K-12 Schools**



**Medical Offices**



**Office Buildings**



**Retail Stores**



**Supermarkets**



**Warehouses**



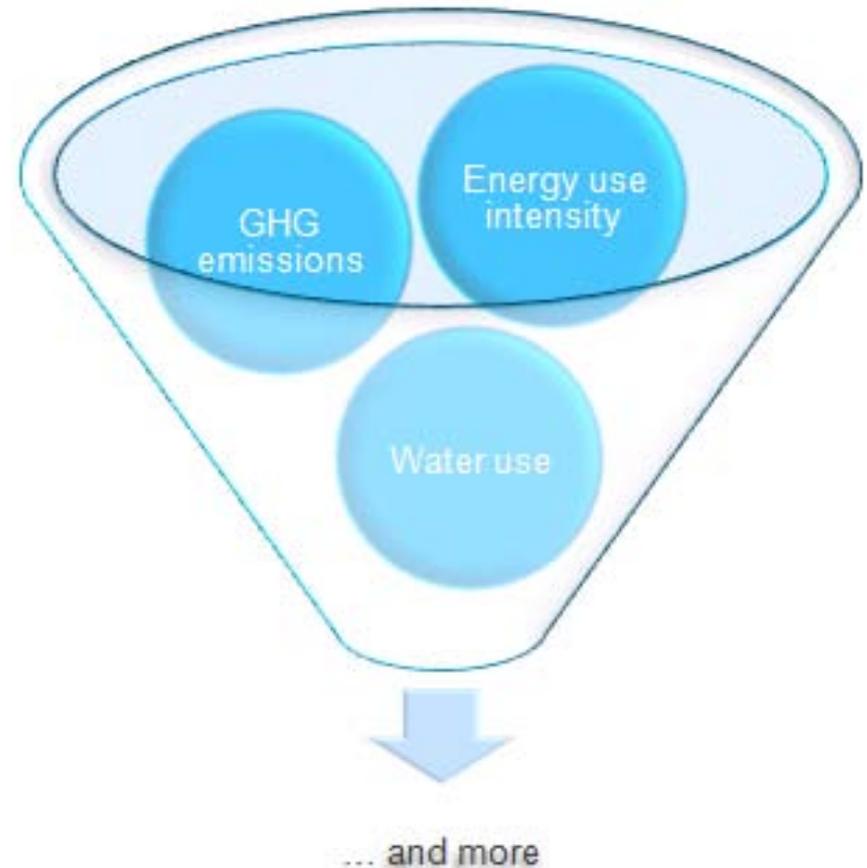
**Wastewater  
Treatment Plants**



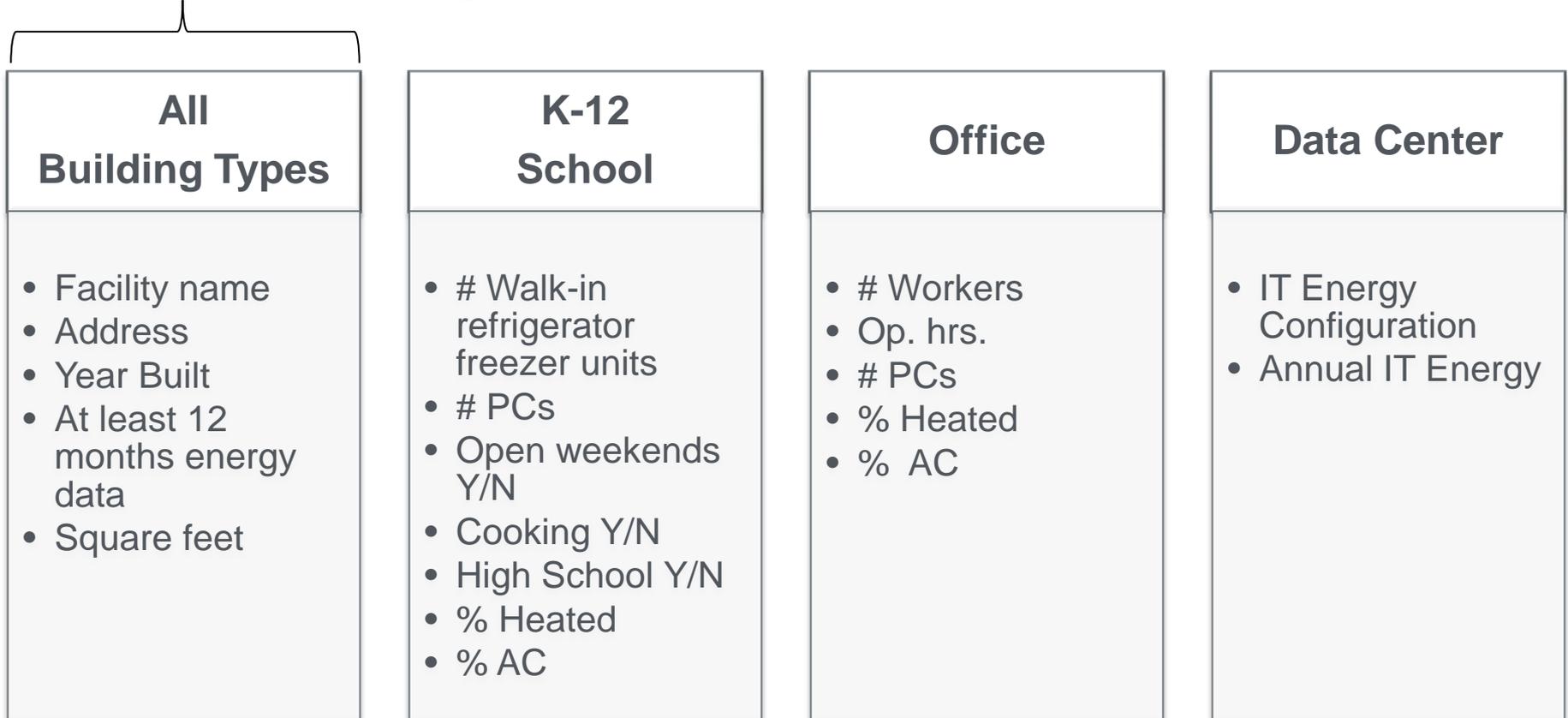
**Senior Care  
Communities**

# Valuable for *ALL* Commercial Buildings

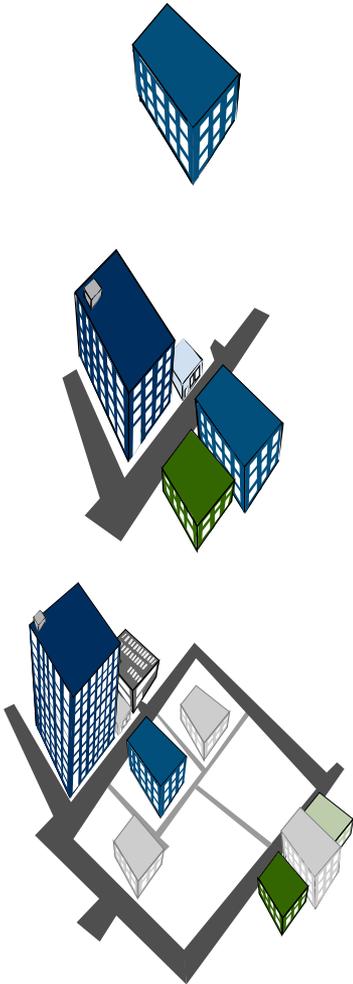
- Track water use, energy intensity, and emissions
- Compare to national average energy intensity for the building type
- Such as:
  - Police Stations
  - Fire Stations
  - Libraries



## Required for Energy Intensity



## Additional Information Required for Score



- **Single Building Manual Entry**
  - Enter benchmarking information into Portfolio Manager.
- **Bulk Data Upload**
  - Upload large sets of data in Portfolio Manager using an Excel template.
- **Automated Benchmarking Services**
  - A framework for exchanging data using web services between the EPA's rating system and third parties.

# Service Providers Offer Automated Benchmarking

- Advantage IQ
- American Energy Assets
- Angus Systems
- CA Technologies
- eComponents Technology
- EduCon
- ei3
- Energard Technologies
- Energy Print
- Energy Watchdog
- EnergyCAP, Inc.
- EnergySolve
- IBS, Inc.
- Johnson Controls
- LPB Energy Management
- New Energy Technology
- NISC
- NorthWrite
- Performance Systems Development
- Planet Footprint
- Rapid Improvement Associates
- Siemens
- Summit Energy
- Sustainable Real Estate Manager
- The E Group
- TRC Energy Services
- UtilityAccounts.com

**Complete list:** [http://www.energystar.gov/index.cfm?c=spp\\_res.pt\\_spps\\_automated\\_benchmarking](http://www.energystar.gov/index.cfm?c=spp_res.pt_spps_automated_benchmarking)

- Current ABS providers
  - **Washington Utilities:** Avista Utilities, Puget Sound Energy
  - **California utilities:** PG&E, SDG&E, SoCal Gas, Southern California Edison, SMUD
  - ComEd, WPPI Energy (WI schools)
- Developing ABS
  - Seattle City Light
- Considering ABS
  - Austin Energy, Arizona Public Service, Baltimore Gas & Electric, Pepco

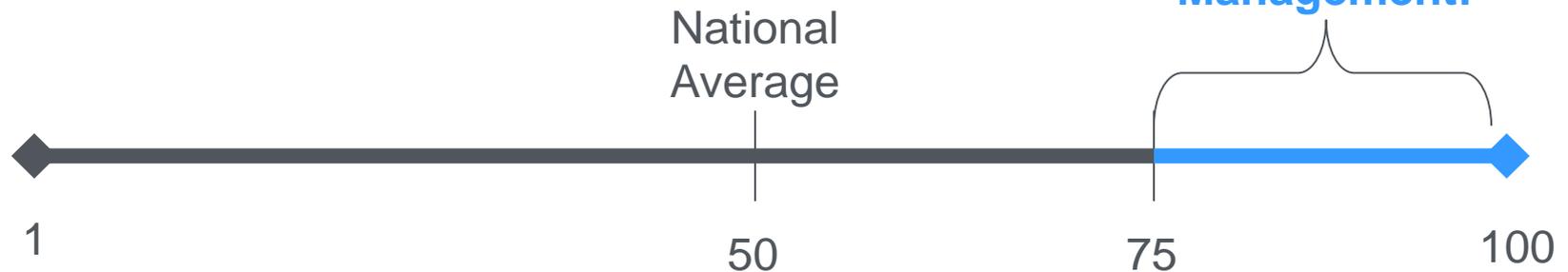
- Statement of Energy Performance
  - Official output of Portfolio Manager
  - Document single building benchmarking results
- Create custom views
  - Track “Change from baseline: adjusted energy use (kbtu)” to demonstrate savings from EECBG retrofit projects
- Reporting tool capabilities
  - Gives access to much more data
  - Use standard “Energy Performance” report
  - Download data in Excel, CSV, PDF, and XML

***Portfolio Manager offers a FREE and uniform way to disclose energy performance – to meet internal policies or for external requirements.***

- National recognition for top energy performance of commercial buildings.
  - Professional Engineer or Registered Architect must stamp application.
  - Receive a certificate of achievement and a blue or white decal.

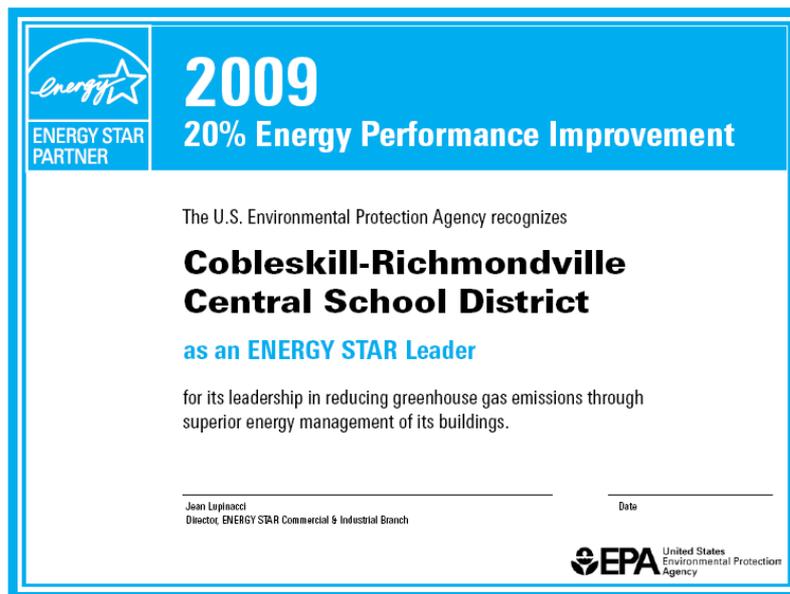


**Superior Energy Management!**



Percentile of Commercial Building Population in terms of Energy Performance

- **ENERGY STAR Leaders** for portfolio-wide improvements
  - Benchmark portfolio of buildings
  - Show improvement of 10%, 20%, 30%, etc.
  - Average portfolio score of 75 or higher

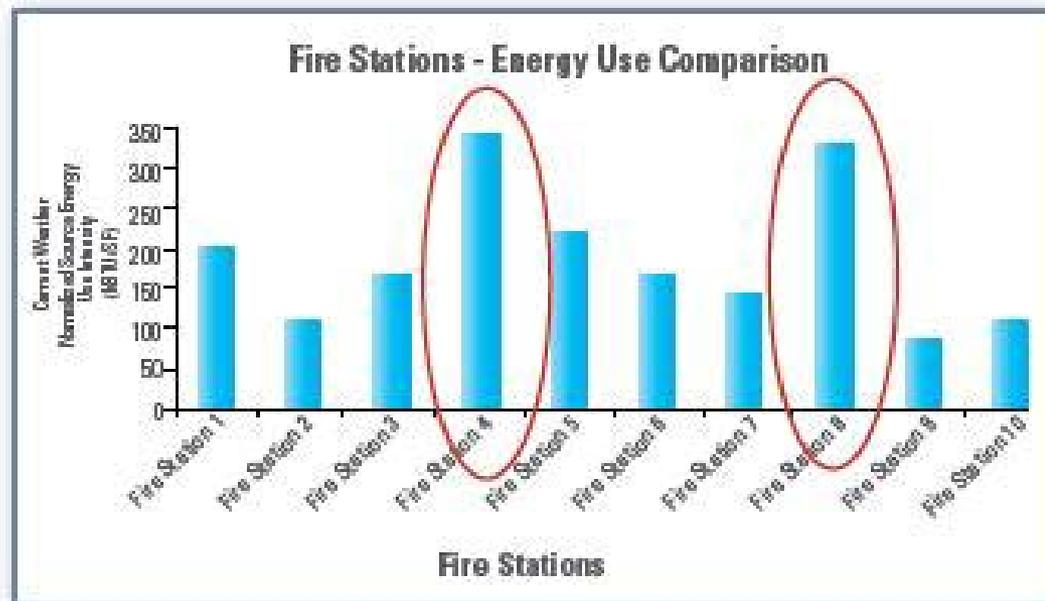


- Enable portfolio-wide, continuous energy management strategy and reductions
- Verify pre- and post-project energy use, GHG emissions, and energy costs
- Identify under-performing facilities
- Assess effectiveness of current operations, policies and practices
- Assist in planning: set goals, targets, and timelines
- Set investment priorities
- Be more responsive to on-going issues
- Identify billing errors



# Identify Best Opportunities for Improvements

- Identify under-performing buildings to target for energy efficiency improvements.
- Conduct low cost “pre-audits” of building energy use



Prioritize efforts by identifying under-performing buildings.

## Free simple analytical tool

Web-based, no cost, easily understood, 1-100 scale, weather normalized EUI

## Industry standard

More than 200,000 commercial and institutional buildings benchmarked in Portfolio Manager

Over 12,000 buildings certified

## Comprehensive development process

Extensive research and data base

EPA, DOE, NOAA

## Symbol of superior energy performance

Recognized by 80% of Americans

# Grantee Example #1

Rick Sunday  
Infrastructure Systems Division Manager  
Facility Management  
County of Hidalgo, TX

# Facilities Management Department, Hidalgo County, Texas Getting Started with Portfolio Manager and Follow Through

- Phase I- AEP/CLEAR Results Driven
- Suspected Energy Hogs, No Perspective or Comparison
- Portfolio Manager “1,000” foot view to start, value increases over time
- Necessity driven, made time to do it despite none, glad we did
- Good exercise, very revealing
- Bad data in, bad info out
- Multiple payer entities, ESIs hard to find
- Phase II – Verify existing data with physical inspections.
- Build data, add buildings
- Zero in on energy hogs
- Identify “low hanging fruit”, save most of it for “blending”
- Develop 5 year Energy Plan
- Evaluate “in-house” vs. “contracted out”
- Measure results, compare to benchmark buildings in Portfolio Manager

## Grantee Example #2

Ryan Dicks  
Sustainability Director  
Pierce County, WA



# Pierce County Office of Sustainability

## **What we are working towards:**

The Pierce County Office of Sustainability's goals are to reduce energy use by 15% and water use by 10% by 2015.

## **Where we are right now:**

We have currently reduced our energy use by 11.2% and our water use by 3% since January 2010

## **What we are doing to reach our goals:**

We are using Energy Star's Portfolio Manager to track monthly energy and water use at 67 facilities, which amounts to 220 utility meters

We are proactively pursuing conservation measures by conducting energy/water audits and utilizing all appropriate rebate opportunities

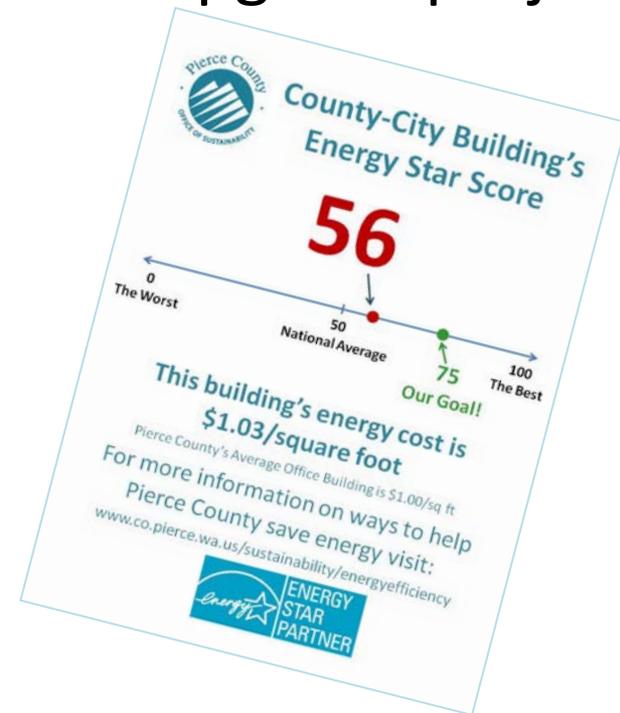


# Benefits of Energy Star's Portfolio Manager

- Identify underperforming buildings
- Focus efficiency upgrade projects where they will make the greatest impact.
- Monitor efficiency progress and ROI from upgrade projects.



- Create measurable goals and track our overall energy and water reduction.
- Communicate building performance to staff to raise awareness about conservation.



## Grantee Example #3

Brendan Shane

Chief, Office of Policy and Sustainability

District Department of the Environment

Washington, DC

# Private Building Energy Star Benchmark Requirements



## Clean and Affordable Energy Act - Major Provisions:

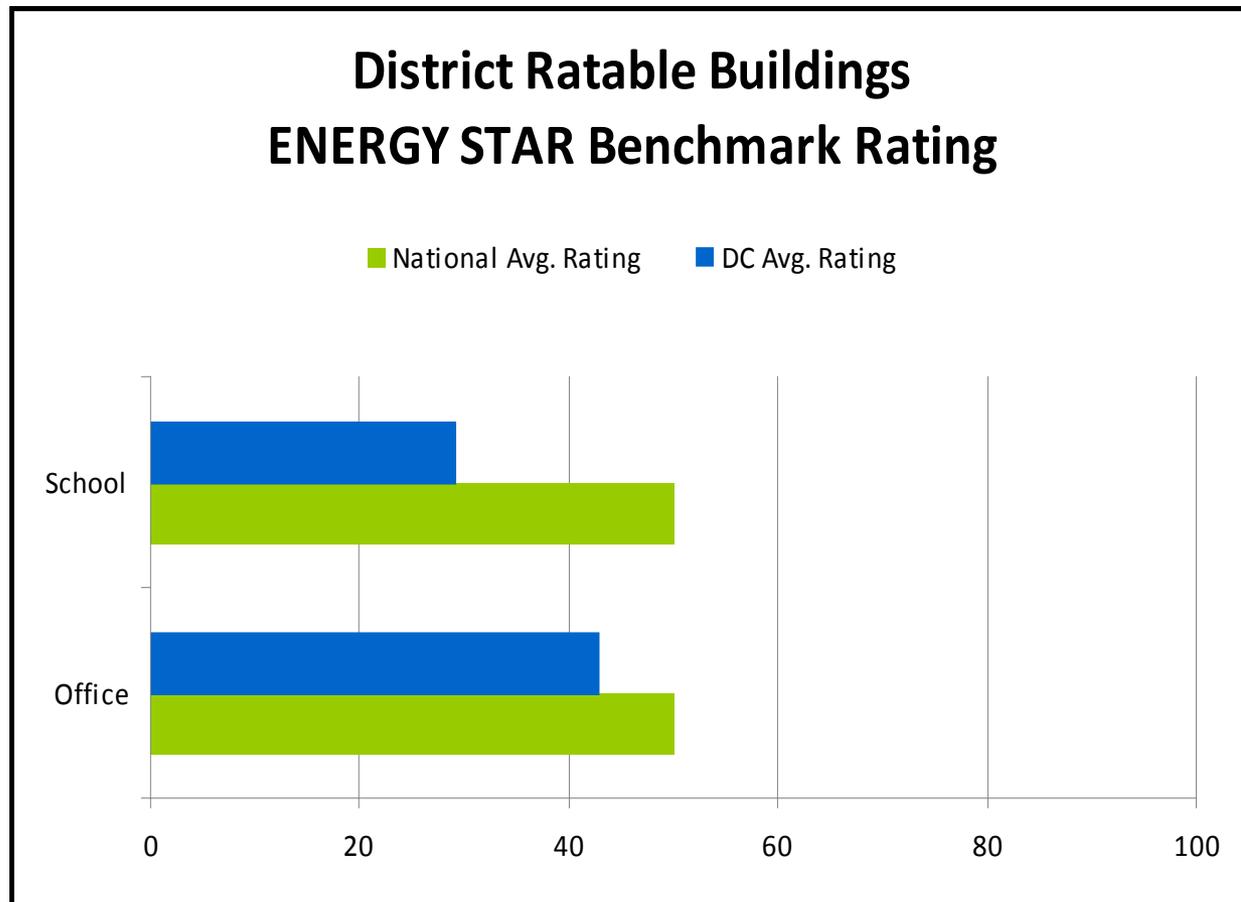
- Public Building ENERGY STAR benchmarking of (10,000 sq feet or larger) and reporting of scores beginning with Fiscal Year 2009
- **Private Building ENERGY STAR benchmarking phased beginning 2011 (calendar year 2010 data)**
- Construction permits issued January 2012 or later to require ENERGY STAR Target Finder modeling

**CAEA and 2007 Green Building Act enacted by District Council based on considerable community stakeholder input**



## Fiscal Year 2009 Ratable Buildings

106 Schools and 7 Offices



# Public Benchmarking Results



**Fiscal Year 2009**  
**Non-Ratable**  
**81 Buildings**

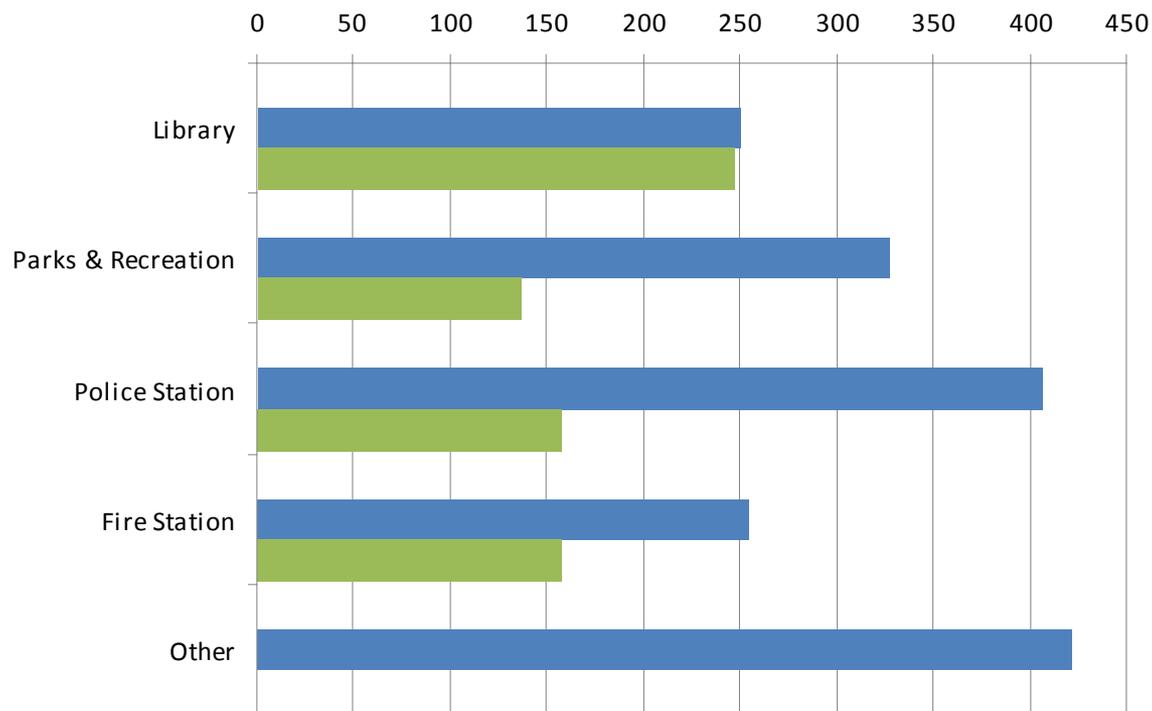
Libraries  
Parks & Recreation  
Police Stations  
Fire Stations  
Other

## ENERGY STAR Benchmark Results

District Public Buildings (Non-Ratable)

Energy Use Intensity (EUI)

■ DC Average (kBtu/SF) ■ National Average (kBtu/SF)



# Private Energy Star Benchmarking



## Phased implementation for private ENERGY STAR reporting

200,000+ ft <sup>2</sup>	2010 data (first report in 2011; public in 2012)
150,000+ ft <sup>2</sup>	2011 data (first report in 2012; public in 2013)
100,000+ ft <sup>2</sup>	2012 data (first report in 2013; public in 2014)
50,000+ ft <sup>2</sup>	2013 data (first report in 2014; public in 2015)

## Rulemaking and Implementation Outreach

- Stakeholder meetings prior to draft regulation
- Proposed regulation waiting on legislative updates
- Developing District Web Portal and District-specific reporting template with USEPA
- 2010 data due Fall 2011, 2011 data due April 1, 2012
- Over 500 buildings required to report year one; 3,000+ after phase-in

# Status Update



## Even before rule implementation...

- 149 EPA Energy Star® rated buildings (54 million ft<sup>2</sup>)
- Many more using Portfolio Manager

## Significant Considerations...

- Stakeholder outreach and participation
- Training and education
- Easy online reporting
- Residential building compliance
- Reporting of tenant data
- Automated utility reporting
- Enforcement methods and capacity

1. Attend a Portfolio Manager Demo (**9/14**)
  - Information will be emailed to webcast attendees
2. Contact your Project Officer or Joel Blaine ([joel.blaine@ee.doe.gov](mailto:joel.blaine@ee.doe.gov)) if you have any questions
3. Submit an application (**by 10/7**)
4. Save energy and money for your organization!

# Q&A

Joel Blaine, [joel.blaine@ee.doe.gov](mailto:joel.blaine@ee.doe.gov)

DOE Lead for EECBG Portfolio Manager Initiative

Sara Lisauskas, [slisauskas@icfi.com](mailto:slisauskas@icfi.com)

Technical Expert for EECBG Portfolio Manager Initiative