Frequently Asked Questions (FAQ) for Washington State Agencies, Colleges and Universities

DES Energy Program

Benchmarking Using the EPA Portfolio Manager

Q. Where can I find more information about Portfolio Manager?

A. The ENERGY STAR Portfolio Manager Overview page is the place to start. The Training webpage contains Express Videos and other resources.

Q. What is the Portfolio Manager and what will it do for state agencies?

A. The EPA Portfolio Manager is an interactive energy management tool to track and assess energy and water consumption across the entire portfolio of state agency buildings in a secure online environment. The Portfolio Manager software, database, data storage, technical support and training are provided by EPA at no cost to state agencies. Agencies will use Portfolio Manager to identify under-performing buildings, verify efficiency improvements, track agency goals for reducing energy use, and collect building energy use data for reporting greenhouse gas emissions.

Q. Where can I find the benchmarking requirements for qualifying public agencies?

A. See RCW 19.27A.190 for building energy benchmarking requirements. Definitions are at RCW 19.27A.140.

Q. Where can I find training?

A. The DES Energy Program provides links to training and other resources on the DES Portfolio Manager webpage.

Q. How do I enter my buildings into Portfolio Manager?

A. Start by viewing the Express Videos on the EPA Portfolio Manager website. Other helpful information is available on the Training webpage.

Q. Will utilities upload my energy use data into Portfolio Manager automatically, and if so, when?

A. See RCW 19.27A.170. On and after January 1, 2010, utilities that serve more than 25,000 customers will maintain records of the energy consumption data for public agency buildings to which they provide service, in a format compatible for uploading to EPA's Portfolio Manager. The utility will upload the energy consumption data to Portfolio Manager upon customer request. The utility will require your written authorization. Contact your local utility to find out how to initiate this data uploading.

You will have to enter data manually if your utility serves fewer than 25,000 customers. Fuel oil, propane and other fuel types will have to be entered manually. If you are entering energy data for many meters at once, you can upload data in bulk using the Excel spreadsheet template. For how to enter meter data manually, View the Express Video on How to Set up Energy and Water Meters in Portfolio Manager.

Q. Our campus has many buildings served by one gas meter, one water meter, and several electrical meters. How do I enter my buildings, which are not separately metered, into Portfolio Manager?

A. Many state buildings on campuses share meters. This makes it difficult for the facility operator to closely manage the energy use of each building. Every new state agency building must now be separately metered at the time of construction. Consider how to meter existing buildings. Meanwhile, even if individual buildings are not metered separately, you can enter your facilities into Portfolio Manager, create a campus, and create campus meters. See How to Benchmark a Campus, on the Portfolio Manager Training page. The campus feature within Portfolio Manager provides energy managers with a central view of all campus facilities and a calculated combined energy usage based on combined floor space.

Q. None of the buildings on our college campus are rated building types. They can't get scores, so we can't benchmark them. What good will it do to enter them into Portfolio Manager?

A. Any building can be benchmarked, regardless of whether it is a rated building type. The term benchmark is sometimes used to refer to measurement against some accepted standard, which could refer to a rating system. For state agency and college buildings, the benchmark is the current energy use of the building itself, which will be used to measure improvement. From RCW 19.27A, "'Benchmark' means the energy used by a facility as recorded monthly for at least one year and the facility characteristics information inputs required for a portfolio manager." Energy use recorded and tracked over time will be used to measure your success in meeting energy and greenhouse gas reduction goals.

If a "space type" does not match definitions in Portfolio Manager, users should not try to "force" the building into one of the building types in order to receive an EPA rating. To see a current list of buildings that can receive a score and eligibility requirements, please visit the Portfolio Manager website. Any building that does not fit into one of these building types should be entered as "Other" space type in Portfolio Manager.

EPA is always working to develop rating criteria for additional segments of the commercial building market. For those buildings that are not eligible to receive a rating, EPA has created a list of reference energy performance targets. These are based on average energy use calculated across different types of buildings. These energy performance targets are not normalized for climate nor adjusted for activities which may affect energy use. All targets are

expressed in energy use intensity and are derived from the Commercial Buildings Energy Consumption Survey.

Q. It would be easier to enter facilities into Portfolio Manager as a campus, rather than enter each building in as a facility. Can I do this?

A. It is possible to create a campus without entering each building as a facility. The OFM Unique Facilities Identification (UFI) number for each of your buildings will be used for all kinds of reporting and tracking. If you do not use the OFM UFI number in the Portfolio Manager, it will create difficulties in identifying your buildings and correlating them with the reported campus energy use. The OFM UFI number will be used to associate the energy use of each building with its characteristics in the OFM Facilities Inventory System, and this information will be used to post building energy use for public viewing, and create reports required by law.

Q. We are a large agency with buildings all over the state, many of them small and isolated. Is there a way for a single person to enter energy use data for many facilities, rather than ask each building manager to learn and use EPA's Portfolio Manager?

A. It is possible to collect energy use data on an Excel spreadsheet and upload the data from the spreadsheet into the Portfolio Manager account for various facilities. Even if he or she does not enter the data into Portfolio Manager, it is best practice for the facility operator who is managing the energy use of the building to see and report on the utility billings to the business manager on a monthly basis. Feedback from utility bills can flag leaks, billing errors, or increases in energy use, allowing the facility operator and business manager to make corrections to avoid further losses.

Q. Does Portfolio Manager account for climate differences between Eastern and Western Washington? Does it account for temperature differences from year to year, such as in an exceptionally hard winter?

A. Yes, weather-normalization is an automated process in Portfolio Manager that mathematically adjusts actual energy data (site energy use) so it represents energy typically used in an average year for the same location. This accounts for weather differences from year to year that may result in abnormally high or low energy consumption. Portfolio Manager requires at least 11 consecutive periods of energy data during a year to calculate weather-normalized data. To compare the energy performance of two similar buildings in different climates, or the performance of a single building from year to year, refer to the weather normalized source energy use intensity, which is calculated in Portfolio Manager using site energy use data entered by the user. Weather normalization is available for buildings, but not campuses.

Q. What is source energy?

A. Source energy represents the total amount of raw fuel that is required to operate the building. It incorporates all transmission, delivery, and production losses, thereby enabling a complete assessment of energy efficiency in a building. Site energy is the energy consumed onsite, which is the quantity you see on your utility bill.

EPA provides an explanation of the distinction between site and source energy.

EPA's national energy performance ratings evaluate the performance of buildings that use all types of energy. To compare this diverse set of commercial buildings equitably, the ratings must express the consumption of each type of energy in a single common unit. EPA has determined that source energy is the most equitable unit of evaluation.

Q. My campus is served by a central steam plant. I use natural gas boilers to create the steam. I have meters on some buildings which tell me approximately how much steam energy each building is using. How do I enter the buildings and meters on this campus into the Portfolio Manager?

A. Enter your properties (buildings) into the Portfolio Manager. Create a campus, associate the buildings with the campus, and enter the utility meters (for which you pay utility bills) into the Portfolio Manager, including any natural gas meters which provide energy for creating steam. See How to Benchmark a Campus, on the Portfolio Manager Training page. You can also create building energy meters in Portfolio Manager for the whole-building steam energy meters and whole-building electricity meters which you have installed at each building. In Portfolio Manager, you will choose which meters are counted toward the total energy use of each building, and which meters are counted toward the total energy use of the campus. The key thing to remember is that you want the Portfolio Manager to add up the total energy purchased from utilities for the campus, and not count it again after it is converted to steam, hot water, or chilled water. When all your buildings are metered, the actual fuel consumption for the campus from utility meter readings and purchased fuel should exceed the total of all whole-building submeters. You will identify losses or discrepancies, such as energy lost in distribution, and small unmetered buildings or pumping stations. Steam metering at the building level is approximate. Ideally, all utility meters and fuel purchases should be tracked in Portfolio Manager for the campus, and whole-building meters should track each building's energy use in Portfolio Manager.

Q. We have had personnel and budget cuts. My staff does not have time to learn the Portfolio Manager and enter this data. We don't have funds to hire someone to do this for us.

A. Talk to other facility managers who were already using Portfolio Manager prior to this requirement, to determine how much effort it will require to enter your buildings, and what the benefits are. Training and technical assistance are available at no cost. It should take less than an hour to create an account and enter your first building into the Portfolio Manager, if done by someone who knows the building and its operations. Other buildings will take less time, as you become familiar with the program. Campuses are more complex, and may take more time. If you have not had a DES Energy Program energy audit within the last 5 years or more, or if your last audit was partial, you may be able to get your buildings entered into Portfolio Manager as part of an energy retrofit which pays for itself from energy savings. If you are in Puget Sound Energy territory, you may qualify for incentives to help you fund a Resource Conservation Manager (RCM), who finds energy- and cost-saving opportunities. The PSE RCM program includes Utility Manager software, which collects meter energy data. To learn more about how to transfer data into Portfolio Manager, please contact your Utility Manager software account manager (Note: Many Utility Manager users are experiencing incompatibility problems between

that program and Portfolio Manager. Please contact your Utility Manager software account manager to resolve). An RCM can enter your facilities into Portfolio Manager for you. Alternatively, you may find a champion in your business office or facilities team, or a college intern, who is enthusiastic about environmental responsibility and wants to enter your buildings into Portfolio Manager. If you use Portfolio Manager to track and pursue energy savings, the time you spend entering the data will pay for itself many times over.

Q. Will anyone else be able to see my Portfolio Manager data, or change it?

A. Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment. You control access to your Portfolio Manager account. You can share your account with other users, and you define what level of access they. Determine who in your agency needs access, and what type, when deciding how to share your account access. You will share your account with the Department of Enterprise Services (DES), giving read-only access, so that DES can post the energy use of your properties for public viewing and create reports. The building energy use data in your Portfolio Manager account will make it easy to report to Ecology on greenhouse gas emissions due to building energy use (scope 1 and scope 2).

Q. How do I share my account with others within my agency?

A. On the Portfolio Manager website, see "How to share properties with other users in Portfolio Manager."

Q. How do I share my account with the Department of Enterprise Services (DES)?

A. Please see "How to Share a Facility with DES." You must share both the parent (campus) and child (building) properties on a campus.