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 free scorecards from EPA showing how their 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 through a Supplemental Survey, as well as energy use, gross floor area, and water use (optional) data for the **2021 calendar year.** Energy and water use data will be collected through ENERGY STAR Portfolio Manager® using the Property Sharing 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 a best practice to use the Data Quality Checker featured in Portfolio Manager to help identify possible data entry errors. Upon submission, 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.**

NEW! This year, participants have the option to create a single submission for one or more **residential buildings**. Provided sufficient responses are received, a performance scorecard comparing your residential building data against that of other submitters will be provided. This a separate submission from the campus data. Details on both submission processes are outlined below.

① Preparing Your Data in ENERGY STAR® Portfolio Manager®

Campus-Level Data Submission

To compare institutions at the same scale, EPA needs all participants to submit data at the campus-level. For the purposes of this initiative, a "campus" is defined as 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. The usage data and GFA you submit should 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.

- **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, water, or floor area 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;
    - 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

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

- 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 Submission (Optional)

We welcome participants to also create a **single submission** consisting exclusively of one or more residential buildings and their energy use, gross floor area, and water use (optional). **Note:** Residential buildings should still be included as part of the main campus submission if they are present on campus.

When naming the residential building data 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**").

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, water use (optional), and gross floor area data to participate in the HEBI. All participants should ensure that their Portfolio Manager data aligns with these instructions prior to submitting. These steps apply both for campus-level data submission(s) and the residential building data submission.

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 data for the HEBI.

Step 2: Set up your information

Option A:

If you are already benchmarking individual building data in ENERGY STAR Portfolio Manager, the easiest way to submit your data to EPA for the HEBI will be to create a new parent property in the tool. You will be able to associate any already-benchmarked buildings as "children" to the new campus-level parent property after it is created, also associating their energy/water meters so that data rolls up. What you submit to EPA will be the parent or campus property ONLY.

- 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.

> **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.

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Option B:
Create a single property in the tool that represents multiple buildings. This option makes the most sense if you are new to Portfolio Manager or are not already benchmarking individual buildings in it.

Additional Guidance

- Remember to give your campus or residential building data 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**."

  o **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.

  o 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.

Step 3: Enter Energy and Water Use Data

If you used Option A in Step 2, you should be all done! For those who used Option B, you now need to enter your utility data.

- 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 Submissions

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**." *Wait for the connection request to be approved before moving on to the next step.*

3. From the main menu, click the "**Sharing**" tab. Then click "**Share with your Utility or Service Provider for exchanging data**."

   a. Under heading, "**Select Web Services 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.

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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 residential building data submission using the outlined naming conventions.
- 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 Visit the ENERGY STAR® Portfolio Manager® Help Desk to learn more about the platform, contact support, and access additional training resources.

☐ **Get Your Data Ready in Portfolio Manager and Submit**

- o Run the Data Quality Checker to review your data for potential entry errors.
- 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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