

# ENERGY STAR® Portfolio Manager Data Collection Worksheet



This worksheet was designed to help building owners and managers collect data to benchmark buildings using EPA's ENERGY STAR Portfolio Manager. The information in this worksheet will be used to establish your building's profile in Portfolio Manager, which is critical to calculate benchmarks of key metrics such as energy intensity and costs, water use, and carbon emissions. **All building types can be entered into Portfolio Manager and receive energy and water benchmarks, as well as a comparison of performance against a national average for buildings of a similar type.**

Some buildings will also receive an ENERGY STAR score. The ENERGY STAR score is a benchmark that indicates how efficiently buildings use energy on a 1-100 scale. A score of 50 indicates that energy performance is average compared to similar buildings, while a score of 75 or better indicates top performance, and means your building may be eligible to earn the ENERGY STAR label. To receive an ENERGY STAR score, the gross floor area of the building must be comprised of more than 50% of one of the following space types: bank/financial institution, courthouse, data center, hospital (general medical and surgical), hotel, house of worship, K-12 school, medical office, office, residence hall/dormitory, retail store, senior care facility, supermarket/grocery store, warehouse (refrigerated and unrefrigerated), and wastewater treatment plant.

*Use this worksheet to collect the data for all space types applicable to your facility.*

## Required Data for ENERGY STAR Benchmarking

- Portfolio Manager username and password.
- The building street address, year built, and contact information.
- The building gross floor area and key operating characteristics for each major space type. Use this worksheet to collect this information before logging in to Portfolio Manager.
- 12 consecutive months of utility bills for all fuel types used in the building. If you don't have this information readily available, contact your utility provider(s) as most will be able to easily supply this historical information.

## General Building Information

Facility name \_\_\_\_\_ Year built \_\_\_\_\_

Building address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

## Space Use Attributes

Before compiling the information noted in the boxes below, review the following important information:

- Specific definitions and instructions for each of the data fields listed in the boxes below can be viewed by navigating to [Portfolio Manager Help](#), selecting "Space Type Definitions," choosing the appropriate building type, and selecting "Space Use Information."
- Some buildings may contain multiple space types within a single building (e.g. office, data center, and parking OR K-12 school and swimming pool). Complete the fields below for each applicable major space types within the building.
- For buildings with multiple tenants with the same space type, these spaces should be entered separately only when the number of weekly operating hours among tenants differs by more than 10 hours. For example, in a 100,000 square foot (SF) office building where 75,000 SF operates 60 hours a week and 25,000 SF operates 80 hours a week, please list as two separate spaces – one 75,000 SF space and one 25,000 SF space. As this is most common in office buildings, multiple office space fields are provided below to capture data for multiple tenants if necessary.
- Default values supplied by Portfolio Manager can be used for all space use characteristics with the exception of gross floor area. Using default values will result in an approximate energy performance score which can be a beneficial metric for estimating energy performance. If defaults are used for an initial score, it is recommended that actual data be added later to more accurately measure a facility's energy performance. Facilities using default values are not eligible to apply for the ENERGY STAR label. Leave any of the requested information below blank (except gross floor area) to use a default value for the field.

**Bank/Financial Institution:**

**Required:**

- \_\_\_\_\_ **Gross floor area (SF)**
- \_\_\_\_\_ Weekly operating hours
- \_\_\_\_\_ # of workers on main shift
- \_\_\_\_\_ # of personal computers
- \_\_\_\_\_ Percent of floor area that is air conditioned (>=50%, <50%, or none)
- \_\_\_\_\_ Percent of floor area that is heated (>=50%, <50%, or none)

**Courthouse:**

**Required:**

- \_\_\_\_\_ **Gross floor area (SF)**
- \_\_\_\_\_ Weekly operating hours
- \_\_\_\_\_ # of workers on main shift
- \_\_\_\_\_ # of personal computers
- \_\_\_\_\_ Percent of floor area that is air conditioned (>=50%, <50%, or none)
- \_\_\_\_\_ Percent of floor area that is heated (>=50%, <50%, or none)

**Data Center:**

**Required:**

- \_\_\_\_\_ **Gross floor area (SF)**
- \_\_\_\_\_ IT Energy Configuration – Select one from:
  1. Uninterruptible Power Supply (UPS) Meter supports only IT Equipment. **(Preferred)**
  2. UPS Meter includes non-IT load of 10% or less.
  3. UPS Meter includes non-IT load greater than 10%. Non-IT load is sub-metered.
  4. UPS Meter includes non-IT load greater than 10%. Non-IT load is **not** sub-metered.
  5. Facility has no UPS Meter.
  6. IT Energy is not current metered at this facility – Apply Estimates.
- \_\_\_\_\_ IT Energy Data – 12 months of measured energy consumption data is required from either the UPS or PDU Meter, depending on IT Energy Configuration

Meter Type (select 1): UPS Output or PDU Input

Month	Start Date	End Date	Energy Consumption (kWh)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

**Optional:**

- \_\_\_\_\_ UPS System Redundancy (N, N+1, N+2, 2N, greater than 2N, none of the above)
- \_\_\_\_\_ Cooling System Redundancy (N, N+1, N+2, 2N, greater than 2N, none of the above)

<p><b><u>Hospital (General Medical and Surgical):</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area</b> (&gt;20,000 SF)</p> <p>_____ # of staffed beds</p> <p>_____ # of MRI machines</p> <p>_____ # FTE workers</p> <p><b>Optional:</b></p> <p>_____ Laboratory on-site – yes or no</p> <p>_____ Laundry facilities on site – yes or no</p> <p>_____ Number of Buildings</p> <p>_____ Maximum # of floors</p> <p>_____ Tertiary care facility – yes or no</p> <p>_____ Ownership Status (drop down of options)</p>	<p><b><u>House of Worship:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Maximum seating capacity</p> <p>_____ Weekdays of operation</p> <p>_____ Hours of operation per week</p> <p>_____ # of personal computers</p> <p>_____ Presence of cooking facilities - yes or no</p> <p>_____ # of commercial refrigeration/freezer units</p>
<p><b><u>Hotel:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ # of rooms</p> <p>_____ # of workers on main shift</p> <p>_____ # of commercial refrigeration/freezer units</p> <p>_____ On-site cooking – yes or no</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p> <p><b>Optional:</b></p> <p>_____ Hours per day the guests are on-site</p> <p>_____ Number of guest meals served</p> <p>_____ Square footage of full-service spas</p> <p>_____ Square footage of gym/fitness center</p> <p>_____ Laundry processed at site (drop down of options)</p> <p>_____ Annual quantity of laundry processed on-site</p> <p>_____ Average Occupancy (%)</p>	<p><b><u>K-12 School:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ # of personal computers</p> <p>_____ # of walk-in refrigeration/freezer units</p> <p>_____ High school - yes or no</p> <p>_____ Open weekends – yes or no</p> <p>_____ On-site cooking – yes or no</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p> <p><b>Optional:</b></p> <p>_____ Months of use</p> <p>_____ School District</p>

<p><b><u>Medical Office:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ # of workers on main shift</p> <p>_____ Weekly operating hours</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p>	<p><b><u>General Office 1:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p> <p>_____ # of personal computers</p> <p>_____ Percent of floor area that is air conditioned (&gt;=50%, &lt;50%, or none)</p> <p>_____ Percent of floor area that is heated (&gt;=50%, &lt;50%, or none)</p>
<p><b><u>Multifamily Housing:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p><b>Optional:</b></p> <p>_____ Total number of units</p> <p>_____ Total number of bedrooms</p> <p>_____ Maximum number of floors in the tallest building/tower</p> <p>_____ Percent of square footage devoted to common area</p> <p>_____ Number of laundry hookups in individual apartment units</p> <p>_____ Number of laundry hookups in common areas</p> <p>_____ Total number of dishwashers in all units</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Primary hot water fuel type</p> <p>_____ Resident population type (No specific type, Dedicated Student, Dedicated Military, Dedicated Senior/Independent Living, Dedicated Special Accessibility Needs, Other Dedicated Housing)</p> <p>_____ Government subsidized housing (Yes or No)</p>	<p><b><u>General Office 2:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p> <p>_____ # of personal computers</p> <p>_____ Percent of floor area that is air conditioned (&gt;=50%, &lt;50%, or none)</p> <p>_____ Percent of floor area that is heated (&gt;=50%, &lt;50%, or none)</p>

<p><b><u>Other:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b> (must be less than 10% of gross building floor area in order for the building to be eligible for a rating)</p> <p><b>Optional:</b></p> <p>_____ # of personal computers</p> <p>_____ Weekly operating hours</p> <p>_____ # workers on main shift</p>	<p><b>General Office 3:</b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p> <p>_____ # of personal computers</p> <p>_____ Percent of floor area that is air conditioned (&gt;=50%, &lt;50%, or none)</p> <p>_____ Percent of floor area that is heated (&gt;=50%, &lt;50%, or none)</p>
<p><b><u>Parking:</u></b></p> <p><b>Required:</b></p> <p>_____ Gross floor area that is enclosed (SF)</p> <p>_____ Gross floor area that is not enclosed with a roof (SF)</p> <p>_____ Gross floor area that is open (SF)</p> <p>_____ Weekly hours of access</p>	<p><b><u>Retail Store:</u></b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p> <p>_____ # of personal computers</p> <p>_____ # of cash registers</p> <p>_____ # of walk-in refrigeration/freezer units</p> <p>_____ # of open &amp; closed refrigeration/freezer cases</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Exterior entrance to the public – yes or no</p>

**Residence Hall/Dormitory:**

**Required:**

- \_\_\_\_\_ Gross floor area (SF)
- \_\_\_\_\_ # of rooms
- \_\_\_\_\_ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)
- \_\_\_\_\_ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)

**Optional:**

- \_\_\_\_\_ Computer lab on-site – yes or no
- \_\_\_\_\_ Dining Hall on-site– yes or no

**Senior Care Facility:**

**Required:**

- \_\_\_\_\_ Gross floor area (SF)
- \_\_\_\_\_ # of units
- \_\_\_\_\_ Average Number of Residents
- \_\_\_\_\_ Total Resident Capacity
- \_\_\_\_\_ # of workers on the main shift
- \_\_\_\_\_ # of PCs owned by the community (does not include PCs owned by residents)
- \_\_\_\_\_ # of commercial refrigeration/freezer units
- \_\_\_\_\_ # of commercial washing machines
- \_\_\_\_\_ # of residential washing machines
- \_\_\_\_\_ # of residential electronic lift systems
- \_\_\_\_\_ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)
- \_\_\_\_\_ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)

**Supermarket/Grocery Stores:**

**Required:**

- \_\_\_\_\_ **Gross floor area (SF)**
- \_\_\_\_\_ Weekly operating hours
- \_\_\_\_\_ Workers on main shift
- \_\_\_\_\_ On-site cooking – yes or no
- \_\_\_\_\_ # of walk-in refrigeration/freezer units
- \_\_\_\_\_ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)
- \_\_\_\_\_ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)

**Optional:**

- \_\_\_\_\_ # of open or closed refrigeration/freezer cases
- \_\_\_\_\_ # of registers and/or personal computers

**Swimming Pool:**

**Required:**

- \_\_\_\_\_ Swimming pool size, choose from:
  - Olympic (50 meters x 25 meters)
  - Recreational (20 yards x 15 yards)
  - Short Course (25 yards x 20 yards)
- \_\_\_\_\_ Indoor or outdoor

**Optional:**

- \_\_\_\_\_ Months of use

<p><b><u>Warehouse (refrigerated and unrefrigerated):</u></b></p> <p><b>Warehouse (Unrefrigerated):</b></p> <p><b>Required:</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p> <p>_____ # of walk-in refrigerators/freezer units</p> <p>_____ Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.)</p> <p>_____ Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.)</p> <p><b>Optional:</b></p> <p>_____ Distribution Center – yes or no</p> <p><b>Warehouse (Refrigerated):</b></p> <p>_____ <b>Gross floor area (SF)</b></p> <p>_____ Weekly operating hours</p> <p>_____ # of workers on main shift</p>	<p><b><u>Wastewater Treatment Plant:</u></b></p> <p><b>Required:</b></p> <p>_____ Average influent flow (mgd)</p> <p>_____ Average influent biological oxygen demand (BOD<sub>5</sub>)</p> <p>_____ Average effluent biological oxygen demand (BOD<sub>5</sub>)</p> <p>_____ Plant design flow rate (mgd)</p> <p>_____ Presence of fixed film trickle filtration process – yes or no</p> <p>_____ Presence of nutrient removal process – yes or no</p>
	<p><b><u>Water Treatment and Distribution Utility:</u></b></p> <p><b>Required:</b></p> <p>_____ Average flow (mgd)</p>