*Joel Blaine:* We have here the cover slide for our presentation, Communicating Success: Measuring Improvements and Sharing Results. This is a presentation brought to you in part by the Portfolio Manager Initiative, so if that’s what you’re looking for you’re in the right place. Welcome again. Along with me today I have the pleasure of introducing Leslie Cook from EPA and Stacey Baumgarn from Larimer County, Colorado who you’ll hear from more shortly.

The next slide – thanks. So this presentation is brought to you by DOE’s Technical Assistance Program, or TAP, in cooperation with EPA. TAP provides tools and resources needed to implement successful clean energy programs. You may be familiar with them, but if you’re not you can check out the TAP offering at the Solution Center. We have a link on the slide which we’ll have posted throughout the slides and also afterwards. You can check out what the Solution Center has to offer and also you’ll find a link to the Portfolio Manager Initiative Page. That’s the greatest place, a one-stop shop to see upcoming events for the Portfolio Manager Initiative to see what trainings are recommended for your peer groups.

Now I’ll turn it over to Leslie Cook. Leslie, would you mind giving a quick introduction?

*Leslie Cook:* Sure, thanks Joel. Hi everyone. My name is Leslie Cook and I work at the EPA here in Washington, D.C. and I work with the Energy Star Commercial Buildings program, so I’m very excited to be part of this webcast today. We’re very happy to have been part of this collaborative effort with the Department of Energy and reaching out to all of the EECBG teams and many of you, of course are Energy Star partners. It’s a great – a great collaborative initiative that we’re excited about.

Today we’re going to go through, as Joel said, a discussion on how you can utilize all of the great information that you’re going to be calculating and collecting and reporting in your efforts to measure your building performance levels in Portfolio Manager and how that can really be a cornerstone of the methods that you communicate your successes of your efficiency programs both internally, you know, amongst your staff and other colleagues and decision makers as well as externally. And I’m very excited to have Stacey Baumgarn speaking after me to give a real-life example; to talk about their county’s successes and how they’ve been able to leverage all of the great data that they’re collecting in Portfolio Manager and really use that as a showcase to show real savings.

*Joel Blaine:* Thanks, Leslie. This is Joel again. I forgot to mention a quick logistic issue. If everyone wants to enter their questions over the control panel on the right, we’ll be taking questions that you type in and hopefully cover them at the end, time permitting. If we don’t have time to get to them online we will follow up with you in an e-mail. So if you would, just type your questions in the question box area in the control panel on the right. Thank you. Leslie, I’m sorry.

*Leslie Cook:* Sure, that’s great. Very helpful. So part of this Portfolio Manager initiative, I know many of you have been a part of our training programs throughout the launch of the – our program and perhaps you’ve been engaged with Energy Star before the EECBG project got off the ground, or perhaps you’re new to Energy Star and our Portfolio Manager tool. So just to make sure we’re on the same page, I wanted to provide a bit of an overview of the Energy Star program and how our software, Portfolio Manager, fits in.

Many of you are hopefully aware of the Energy Star program. We are a voluntary public/private partnership program. We work in the products and home and commercial buildings and industrial plants markets. So just like you can go shopping and look for Energy Star-qualified products to indicate an energy efficiency level, you can also get that Energy Star certification for your buildings, and there’s a host of tools available for you in your work in commercial buildings. So Portfolio Manager is one component of our Energy Star commercial buildings program and we have lots of tools and resources for you. I would say Portfolio Manager really is the backbone of our program as we really find that the measurement and understanding of your building’s actual performance at the building level and at your portfolio level is really a key component to a successful energy management program, and Portfolio Manager is the software tool that many of our partners and others are using to assess their performance.

This could take a step back in general. The Department of Energy and EPA and all of you on the line I know recognize and are even increasing the recognition of all of the opportunities we have in our commercial existing buildings to reduce our energy use, reduce our waste and reduce our financial burden through reduction of energy costs, and of course there is many opportunities to check the climate through the reduction of gas emissions. And we found on average in this country about 50 percent of our carbon emissions are coming from our existing commercial buildings and industrial facilities. In our commercial facilities, we’re seeing on average about 30 percent of the energy we use in these facilities is energy that we don’t necessarily need. So our program and our coordination with DOE, we’re really looking to help all organizations become more efficient, use energy where and when you need it and nowhere else and find those cost-effective reduction strategies.

So getting back into Portfolio Manager, which is the focus of this initiative, as a reminder for those who haven’t been able to join our trainings, there’s a brief overview. This software tool is a cost-free online-based tool that is available for you and your local governments who are – or any organization, really, that’s managing or owning existing facilities. So school districts are using the tool, local governments, state governments. We’ve got a lot of market penetration in the private sector, so if you think about who makes up the building owners in your community, this is a tool that all those building owners can be using and probably a lot of them in your community may be using them already. About 230,000 buildings already benchmarked right now in Portfolio Manager, and we’re seeing those numbers grow.

A lot of that is much in thanks to the work that you are doing in your localities to promote efficiency and the coordination we’ve been doing with DOE. So the tool is something that you can use to take all of your utility consumption data and some of you on the line who are familiar with getting into the weeds of this consumption data, multiple utilities, multiple meters, multiple buildings that can get to be a burden to take all that and translate that into an understandable, easily-digestible performance metric, and Portfolio Manager can help you do that by taking all of your actual energy consumption data and you input it into the tool and you get key performance indicators at the whole building level.

That’s one thing to remember. It’s not just electricity, but it’s any energy you’re using in the building, and you’ll get helpful metrics like energy use intensity. When I say that, I mean energy use per square foot. You’ll get total energy use, you’ll be able to track your changes over a baseline, which I think is very helpful, especially for those of you implementing recovery acts funded projects and tracking those changes is key. You’ll be able to get a 1-100 score on many of your buildings and that is a one to 1-100 score that indicates your performance level as compared to your peers. Fifty would be the average, 100 would be the highest. If you receive a 75 or higher, if your building is able to get that score, then you can be eligible for an Energy Star certification.

The tool also tracks weather normalized energy if metric, so the variations of weather – and I don’t know where you are located in the country, but here in the DC area we’ve had some pretty wild weather variations. The tool would be able to normalize those differences for you, so that eliminates what we call statistical noise when you’re looking at your performance year to year and will also track and calculate for you your cost per building, your cost per square foot, your utility costs at the portfolio level and the pre- and post-financial performance levels as you’re working through your projects. We know nowadays those are very, very important metrics to track and to show, both internally and externally, that your projects are finding real cost savings and that’s critical.

And then of course lastly the tool calculates your carbon emissions that are generated with your energy that’s used onsite and that is helpful as well if you’re looking to communicate your pre- and post-gas emissions footprint of your operation. So the tool’s available at the Web site there and looking at today’s topic, which is not how to use it but to use Portfolio Manager, we’ve got lots of trainings available for you if you need to connect with those. We’ve got additional ones coming up with this initiative and we hold regular Webinars on Portfolio Manager to get into the ways of how to use it. Today’s topic is really looking at how you can document your savings in the tool, how can you generate some of these really critical reports and start to verify that the upgrade that you have planned or are implementing, are they really the savings that you expected.

Now is a critical time to look at what worked and what didn’t and what are the best practices coming out of the really great collection of activities that have been ongoing for years, and especially those that are split into the EECBG grants. Looking at verifying your results on the energy savings front, on the carbon front and especially on the financial front, we’ll give you the opportunity to really showcase your success and really verify that this effort was worth it and it’s worth continuing. Something we’re already interested in in this post-ARRA world is continuing the interest and the momentum that your projects have hopefully been gaining.

Show me the money, right? And I know that I’m preaching to the crowd here and the financial health of many organizations in this country can be struggling. If you’re not able to show through your efforts that these projects are saving energy costs, that have potential to save energy costs, it may be difficult to continue to get support for this work. Benchmarking in Portfolio Manager and really tracking closely and communicating those cost savings is gonna help you continue to gain that support. We have custom reports that will allow you to look building by building in Portfolio or groups of buildings as you customize them, how the financial performance is going and that could be by fuel or per square foot. We find that our partners are finding those more and more useful, especially nowadays.

We also have other tools that I won’t get into today, but I would urge you to go to that Web site on your screen – [www.energystar.gov/financialevaluation](http://www.energystar.gov/financialevaluation). We have one tool is the casual opportunity calculator where you can input your building’s current performance level and you can input your actual utility rates that you are paying for the operation of that facility, and the tool will help you calculate the payback period and the cost of the way in terms of waiting to do a project. We have those tools so we can help empower building owners to make the business case to continue those kinds of projects and to not delay.

So what kind of reports do we have available? So getting your data into portfolio manager and maintaining your energy consumption data that continually affects your performance, that’s really what we think of as continuous benchmarking activities, so the fun stuff is really when you start to look at those performance metrics, environmental, energy and financial, and get them out in a way that’s mutual and informative and hopefully can continue to motivate change and be really customized and boosted up on reporting options over the last couple of years as more and more states and local governments are including Portfolio Manager in grant programs and other voluntary programs. You may have also seen that some localities have looked at policies that are mandating benchmarking and disclosure.

So, as our partners are utilizing Portfolio Manager in these ways, we wanted to really get better functionality available so you can use some of our predefined reports. You can see a list on your screen there where we’ve taken a group of what we’ve thought are people from electrics in these various categories like energy performance, utility cost, baseline comparison. That’s where you’re gonna get your pre- and post-performance levels when you’re looking at a project’s emission performance. I should also mention that you can benchmark your water performance in the tool as well. You can look at your energy use. So not a big focus of today, but I did want to mention that.

Those are the pre-populated reports that you’re able to use as you’re looking to gather up your results. You’re also able to take any information that you enter into the tool about your buildings and all of the metrics that are calculated really are yours to pick and choose to customize your own reports. Filter by building type if you’d like. Perhaps you’d like to filter by libraries. Maybe you had a focus on libraries, or maybe you had a focus on looking at different ages of office buildings and you want to compare those. It’s very customizable for you. You’re able to export that data that you pulled together and look at Microsoft Excel .xml comma separated or .pdf files.

I won’t go through this is too much detail, but I did want to include in this slide, which I know will be available to you at the end, how to create those reports in Portfolio Manager. You can get right to these reports as you log into your account next time you’re there to check out your building’s performance. I would recommend that you go into the reporting and play around for a little bit and get familiar with the functionality. There’s a universe support document there available that has step-by-step instructions. We’ve got some recorded trainings and live trainings as well. In short, you really just want to click on that Generate Reports and Graphs and it’s gonna take you to our reporting interface.

One screen shot I wanted to show you out of those that were listed there is just to give you a little bit of the look at feel. You’re going to be able to create your own custom report templates. Remember we’re looking at energy metrics and financial metrics and environmental metrics. Those have been bundled up in folders and it’s really just a drag-and-drop exercise. You can name your report templates and save them for future use. So every time you log in, if you choose to keep your report, it’ll be there. If you find out that you’ve made a great report and you want to share with others – perhaps you’ve got an initiative in your region and you’re working together as a group of local governments – you can all share the same report and start to share information, if that’s something you want to do.

So you really want to take what you’re doing and not only communicate within your organization, but if you choose to share with others, that’s something that you can use as a reporting interface to do. I think we’ll transition up into the next portion of my slides which is really talking about now that we’ve gone through the tools, reviewed Portfolio Manager and looked at the various reporting options that you had, what can you do with this information? It really is powerful to show the results of your projects. I think it’s critical to look at internal and external communications. I know many of you are putting out newsletters, you’re working with blogs, you’re doing Facebook. You’re probably interacting with your colleagues at various regional meetings or other conferences.

Start to think about how you can plug this performance data, these savings results, into your communications and how that can really boost your message and really show these are real-life savings. You want to be able to encourage your own colleagues. Think about the idea of taking your benchmarking results and sharing them amongst your facilities department so that you’re getting away from the process of just maybe a department is paying energy bills by department or maybe they have a centralized accounting responsibility, but think about the process that your facility folks ever get true performance metrics for facilities that they’ve done. Is that something that you’re sharing? If not then perhaps Portfolio Manager can help you do that.

Are you sharing your performance and savings results with decision makers based on real consumption data? I think that’s a very powerful way that you can empower yourselves to show the validity of these projects and to really continually add support to your efforts. Think about communicating them to the community. These folks are your taxpayers. They’re paying the tax bills and you need their support to continue these projects. Too, they’re coming in and out of these buildings, they’re interacting with the facilities every day. Share with them all of the great results that you’re seeing from your projects.

One example I wanted to show you is from one of our long-time partners, Arlington County here in Virginia, in the DC area. They have been looking at their building’s performance in Portfolio Manager. They’ve been using an analysis tool for a number of years now. I hope you can see somewhat clearly on your slide, they have building report cards that they put out on a public Web site. If you think about what you’re able to do in your own community, this perhaps could be the kind of information that would be good to share internally at first as you’re getting a feel for where your buildings are performing and how you’re progressing over time and hopefully finding those increases in efficiency.

This is simply a look at – I pulled two groups of their buildings, fire stations and libraries. Looking at their performance over the last four years, ’07 through 2010, you can see that those bars represent the energy use intensity or kbtu’s – that’s whole building levels per square foot. I can look at this and use it to translate that a lot of their buildings are doing a lot better and they’re finding savings and you can see some of them are perhaps not making as much progress as others, but the point is that this is a very good way for you to validate that and communicate that. I did want to mention that this is a county’s report card and these fire stations and libraries are not one of those building types that can receive that one to 100 score because of data availability. But something as simple as energy use has to be displayed over time and is just as informative for people to see improvement.

I did want to use this to verify with you that just because your buildings don’t receive that one to 100 score, you can still do a lot with that information and manage that end communication. To show you another example which we really love is from our Gresham-Barlow school district. This is a school district out in Oregon. They are a past Energy Star Partner of the Year. I think is example is transferable to you as a local government. I also know that many of you, either directly or indirectly, work with school systems, so I wanted to showcase this. You can see they’ve done measuring their performance and they’ve got a lot of top performers in their portfolio. You can see all the awards they’ve won. The idea is that they’re using and communicating these results and this is a very highly – the energy center is a highly utilized portal for them, for students, for community members, for teachers, for their energy staff and they have lots of ongoing internal staff and student education and competitions.

They’ve got energy teams and they’re all looking and logging in to see how the performance of these businesses is going. You see directly how their actions in this building have equaled some savings as they’ve translated this data. So once you’ve got the data you can do a lot of fun things with it. You can communicate powerful metrics like on the graph to the right. The district has decided to translate their cost savings from their energy \_\_\_ projects into how many teachers’ jobs that has funded. That’s something that really resonates with the community, with the staff, with the students. You can do the same types of conversions with your units to make sure you’re getting a very meaningful message out there. The key is you’ve got the data to start off with.

Looking at your communications strategy and some of you may have a communications staff and some of you may be working to do that as part of your interest in your projects and that’s great. I think there’s a lot that can be done once you are measuring and tracking your savings. Look at your strategic objectives. Is there a certain type of project or focus that you want to continue or that you want to start? Who needs to know about the benefits and the opportunities that these types of projects have as you craft your messages? And as you’re looking at continuing these communications efforts, continuously benchmarking will allow you to keep feeding that great data, that very real savings data, into your messaging to show over time that this is continuing to grow and we think that’s a critical piece of keeping your message important and keeping that top of mind with your decision makers and your community members.

So one way that is a good rally point, perhaps, though your benchmarking efforts, and you’ll hear more from Stacey in a couple of minutes, is that if you have a building type that is able to earn that one to 100 score and it has earned a 75 or higher, it can be certified as Energy Star. You get a nice graphic that can go on the front of the building. We’ve got lots of other visuals that you can use to communicate to everyone in the building and everyone walking by it. We also have an online building directory where you can build your profiles. This is a great way for you to communicate about your success. We’ve heard stories from our partners, and I’m thinking about Louden County school district here in the DC area. The first year they were active on the program they were an Energy Star certified school.

They really made a big deal about it. They had a televised award recognition ceremony with the board, they got the students excited. The next year they had 23 certified buildings. I was speaking to the energy managers there and they said that this type of recognition can really help rally external support for your program. Even if you’re buildings aren’t recognizable with a one to 100 score, just showing those results and getting them out we think can also help. Here are some shots of some of our partners who have really celebrated their Energy Star certification. They’ve met their goal and they’re going to reward those that played a part in that.

Likewise, we’ve found that engaging your employees, perhaps your tenants that may be sharing the building space with you, we’ve built some toolkits for you. This is called Bring Your Green to Work, but I wanted to highlight quickly at the end here, as you’re really looking to communicate your results, how can you package up your benchmarking data and savings results into an educational program for your staff or your colleagues. This is something that is available online. We’ve got fun things – because I know energy efficiency may not always seem that fun. I think it is, but maybe we need to jazz it up a little bit sometimes.

We’ve got an energy quiz, we’ve got some ready-to-go publications for you to use about how to save energy in the workspace and at home. We’ve got things like a Green Team checklist. Lots of tips for engaging folks that you work with all the way from the executive level to the green team level. We’ve got cards that you can distribute at events and one fun thing I wanted to highlight here is as you’re communicating internally and your efforts become more efficient, you may have some internal projects going on. It’s great to include in the messaging that our activities, our energy decisions that we make every day working in these buildings really does have an major impact on how the building will perform and you’ll see that impact in your benchmarking results.

So to close that loop in your communication, looking at educational resources like these – this is an applicable flash cube where you can host this on your own Web site if you like. It’s a fun way to learn about how my day at the office really does make a difference and that really brings home back what those benchmarking results mean. I also didn’t want to leave out the ability for you to take your work in Portfolio Manager and benchmarking and staffing and performance of your buildings and promoting that to building managers in your community. We’ve got a lot of examples ongoing, and some are budding all over the country, voluntary programs that are promoting efficiency, sustainability to building owners in your community. So whatever target market that may be.

If you’ve got an initiative going on or you plan one, keep in mind that we can fold benchmarking into that initiative so that you at the program level are able to measure your results and then communicate them out. So just like you want to communicate your own savings for your own buildings, it’s critical to accurately measure and speak out about the savings your energy projects, community-wide, are realizing. This is a nice shot of the former mayor of Louisville, Mayor Abramson. They recognized all building owners in Louisville that earned Energy Star certifications. There’s an official from the state there as well.

With that, I know many of you have been working with y our states through the EECBG program throughout the last few years and that is fantastic. I’ve heard many great stories about those successes and we – I know we all want to do what we can to continue these relationships. As you’re thinking about communicating your own savings results, how can that interact with your state – your governor’s office, your state energy offices, your departments of education? How can you work within your state communicating the very valuable results of the projects that you have going on that are working? Maybe you’ve got a common target market in your local government and within your state. Maybe you want to team up. We hope that benchmarking and realizing those results can be part of that.

Finally before I turn it over to Stacey, I wanted to make sure that we highlight this really great DOE resource that you have to tell your story. I know that the Department of Energy is very committed to getting out all these success stories far and wide, so get your global recognition. Don’t forget the TAP blog. Take your success stories and fold in your benchmarking results so that you can really beef it up with those consumption data. They’ve got resources to help you submit a press release and if you can work with your project officer there too. So with that I’ll finish my portion of our talk today and hand it over to Stacey Baumgarn with Larimer County. Stacey has got a great story to share with us that reflects upon communicating those great results their finding.

*Stacey Baumgarn:* Thanks for inviting me today to share a little bit of the story from Larimer County. My name is Stacey Baumgarn and I’m the energy conservation specialist and I was hired here in Larimer County after we received our allocation of EECBG funds. So today I want to tell the story of our Larimer County Justice Center and how it relates to Energy Star and Portfolio Manager and our energy efficiency and conservation block grant.

First, the Justice Center was the first Larimer County government building to earn the Energy Star label. Our building was built in the year 2000. It’s about 172,000 square feet, around 225 employees. What’s interesting for us about this building is it has three distinct groups of employees. There’s state employees and county employees, so I work for our facilities department with the county. In this instance we really were reaching out to work with the state employees as well as the county employees that occupy this building.

I do want to touch on how the EECBG fits into this before I say more about the Justice Center. Perhaps like many people on the call, Larimer County received an allocation of EECBG funds. We had a $364,000.00 grant allocation which was just fantastic. You might notice on this list – and I’m sorry there’s a lot of words on the list – but I wanted to just point out the different types of projects – the scope of projects, activities, that we took on with the use of these funds. You might notice there’s a lot of firsts on the list, and that’s something that we’re really excited about. So overall we have 12 projects in five different activity areas.

Most everybody had to do an activity area – one, write a strategy, and I noted hire an energy conservation specialist, and that was me. So my first task was to help prepare the strategy for the county and identify the different projects that we would take on during the grant performance period. We also wanted to complete our first greenhouse gas inventory for Larimer County operations, so that’s just the operations of our Larimer County operations, and that’s just about complete, so that will be very interesting and informative for us to see where we stand in our operation.

Most of our activity was in the activity area six. We have developed employee engagement programs, and that’s where I’ve been spending a lot of my time working, and the Justice Center was a big part of that. We did purchase some energy management software that we’re just getting going. We established this account with Energy Star Portfolio Manager and that has been a real key to moving forward as well. We did a little server virtualization project. I’ve been writing energy policy and an energy action plan for our county. We have begun an energy performance contract. We’re not spending any of our EECBG money on the performance contract other than my time that’s involved as kind of coordinating that effort, but it’s looking pretty good and it’s gonna be pretty exciting.

We’re also building a new building, so we’re working on being sure that will be the first county-owned lead certified building. We also did building codes, adopting 2009 IECC and IRC building codes. Those were just put in place the last couple of months. We did a solar PV project on our county courthouse office building. So that kind of gives us some array of the types of projects that we have taken on here in Larimer County. Mainly I want to say that the grant enabled these projects and helped us to build a lot of momentum. It’s really demonstrated real cost and operational savings, and it’s gonna – with these projects we’re able to build a case to continue these efforts after the EECBG.

This slide, it’s a little busy. It’s just a chart of the electricity use in the Justice Center. You don’t have to worry too much about the numbers, but it’s really the colors that matter. The red cells indicate the month with the highest electricity use across all of the years that we’ve been tracking the energy use of the building. The green cells indicate the months with the lowest use. You might notice there’s a real switch, a real change in that 2008-2009 time period and that was due to a major HVAC upgrade. Those HVAC improvements completely shifted the picture of energy use in the Justice Center.

Just a little foreshadowing here, you might notice in 2011 that it’s almost consistently the lowest electricity use in the past seven years, month after month. That reflects our efforts at involving the employees who work in the Justice Center. We made a big shift from the HVAC improvement, but then we continued to do more and more, and I think do better and better, by involving the people and the occupants that work in the building. So this is a picture of the Energy Star energy performance score. We knew that the Justice Center had a higher-than-average energy intensity from the time it was built in 2000. We had maybe suffered from a little value engineering.

The picture from 2000 to 2005 really was an increasing energy use. In 2008 when we did that, just before we initiated the HVAC improvements, you can see our building was scoring a 38 – not necessarily a score that we would have been proud of. After the first phase of that HVAC improvement we went to a 65, which is just a dramatic jump. Since then you can see we’ve just been tweaking a little here and a little there and, really, the difference has been, this year, involving the occupants. I started using Portfolio Manager in early 2010 and when we started that we could really get a picture of what our energy situation was. Best of all, we could really see the impact of the projects and what was happening. It’s been a great tool for us and a great inspiration, really.

Earlier this year we decided to do three things for the Justice Center. One was we finally had a building that was scoring above a 75, so we though hey, let’s apply for the Energy Star label and use that to create a buzz in our other buildings. We also decided that we would throw our hat in the ring for the EPA National Building Competition. We wanted to use both of those things to really engage the building occupants and help us reduce our energy consumption. So we officially launched an effort on May 10 of this year where in one day we presented the Energy Star plaque to our board of county commissioners, we issued a press release that was picked up by at least five different papers and newsletters in the area and the region. We had a great response.

I gave a motivational pitch, if you will, to the largest group of employees in the building and the official employee program was all launched on the same day. It was really exciting to have something out to the community, out across the county and into the building and it created a lot of excitement and got a lot of people excited about being in a national building competition, being proud of earning the Energy Star label for the building, and it made it really fun. We can go to the next slide.

Our focus for the battle of the buildings, it was really this idea of a lot of times people think what can my building do for me? I wanted to change that story a little bit and figure out what can I do for my building. Behind the scenes we had engaged the facility staff and they had taken on a couple of projects that needed a little inspiration to get off the blocks. The National Building Competition really helped us say okay, let’s go ahead and do these projects. We know there’s some energy savings here and we can do that project. That was really helpful.

Really our credit, I think, goes to the 8th Judicial District green team. This is a green team that meets within the Justice Center and they really got pumped up. They helped to talk it up throughout the building to help communicate that message to the different populations in the building. They were responsible for helping to get all the posters hung up. We made signs about turning off lights that we put up all around the building. They initiated and held a couple of mini contests about turning things off. We borrowed that phrase, “If it’s not in use, turn off the juice.” I think someone had used that for a contest at another location and we really liked that phrase, “If it’s not in use, turn off the juice.” That kept it fun, kept it lively.

I found out we had a really competitive group on our hands and they wanted to do everything they could to contribute to the Energy Savings goal. So by using the team, making it public, hanging the plaque in the lobby, we really got people’s attention and it was positive. It created a lot of that positive peer pressure and created the idea that everyone is doing it. It’s been a fantastic way to create a new normal and we’ve just been very pleased with the results. I guess I’ll say thanks. That’s all I really put together for this. I’m happy to answer any questions, but I want to tank DOE of course for the EECBG grant. Thanks for EPA for the Portfolio Manager tool. It’s a great tool. It’s been very helpful. I’m really grateful also that we had the battle of the buildings to help get us motivated and get involved. So thanks very much, thanks for having me.

*Joel Blaine:* Thanks a lot, Stacey. We really enjoyed hearing from your perspective and seeing how well it worked out on your end. Leslie, also thanks for presenting again and supply a lot of great information to the group here. I’ve already received a couple of questions through the question box on the control panel, so I will cycle through a few of those. We still have, it looks like, about 10 or 15 minutes before the end of this presentation, so if you want to send your questions we’ll be happy to answer them. The first one is, “I’ve heard there will be significant changes to Portfolio Manager in November. What are the changes?” Leslie, I guess that’s directed toward you.

*Leslie Cook:* Yeah, good, well I guess you’ve picked up on our messages. We’ve been trying to get the word out. This is really – we do sort of system upgrades twice a year, once in the fall and generally once in the spring. What we’re doing – and this is – I wouldn’t say wildly significant, but we do have some important, I guess you would call them enhancements. We’ve got some better meter configurations options, so that would be – that was something that we’ve done in partnership with the multi-family sector, actually, where many times their facilities, they really are only able to access common systems and not their tenants’ systems. They wanted to track their buildings, so they need to know which meter configurations they have, so that’s one item that we have.

We also have updated our hospital model, which means that the underlying information that the one to 100 score for healthcare facilities has been updated to reflect more recent hospital data coming out of that market, which was exciting. There’s a few others that may be of interest. We’ve updated our greenhouse gas emissions factors to be, again, more up-to-date with what’s used \_\_\_\_\_\_ and other emissions protocols. So it’s really an enhancement. There’s information very prominently posted on our Portfolio Manager homepage about all of those changes in detail, so if you go to energystar.gov/benchmark and you go to log in, I know sometimes we breeze past that log in page, but that’s where we have those announcements.

*Joel Blaine:* Great, thanks. One other question we had was, “Logistics-wise, will this be posted online or available online?” The answer is that yes, I did reply to everyone. I hope you were able to see it. It’s going to be posted on the Solution Center Portfolio Manager initiative page. The link is a little bit lengthy, so I’ll just advise you to Google Portfolio Manager Initiative Communication Center and that should bring up the page to the Portfolio Manager. We’ll be posting the training online at the bottom. It does take a little bit of time to get that online, to get the recording of the transcript, so if you don’t see it up there right away, please check back and we’ll have it up there eventually.

Another question, “Can you describe the monitoring/measuring equipment or system one needs for a building?” Leslie, I guess I’ll pass that to you.

*Leslie Cook:* I’ll briefly respond to that. I think maybe – Stacey, I’m sure you – given your expertise you can give some really good feedback on that. I think there are lots of different options for various levels of monitoring and measurement at your building. I think looking at the very simple step of measuring your performance at the whole building level, that you’re able to really assess your changes all the time and identify the best practices and identify the buildings that need the most attention. Benchmarking software like Portfolio Manager, there are lots of others out there that do more than Portfolio Manager and many of them feed directly into Portfolio Manager, through their service providers.

So maybe, Stacey, you might have some other thought, too, on various other options, too, to get down to maybe even systems monitoring.

*Stacey Baumgarn:* Sure. I can add this part, I guess. In one of our buildings – in our courthouse offices building – we did install some extensive monitoring using a CT kind of monitor that was integrated for a building automation system. Essentially what we were trying to do, or the goal is – was to measure both – be able to separate all the loads of the building out so we’re able to measure each floor of the building separately for the lighting load and the plug load, and then all of the mechanical systems are monitored separately and the data center that’s located in our building is monitored separately.

So it was a great – it was not inexpensive, but it was a great way for us to – we rolled out our first pilot employee energy challenge in this building were we did a floor-by-floor competition where we were really able to measure it exactly, the impact that the employees have when they turn off more lights and turn off more equipment at the end of the day and on the weekends or when it’s not in use. So that was – it’s been great. It’s been very helpful. But that said, you don’t need to go that far either because when we did our program in the Justice Center, you just get your monthly bill, but by just sharing that information and figuring out some ways to present it to occupants of the building and let them know what their energy use it, and that you have a goal to reduce it, they get very creative and the competitive spirit kicks in and they get very interested in you sharing what the next month’s energy bill was. So it’s kind of two extremes, but that’s’ what most of us are dealing with is just getting the energy bill and month later.

*Joel Blaine:* Great. Thanks, Stacey. Here’s another one for you, “In your presentation you mentioned that you are working on the energy policy for your county. Is it posted on your Web site? I’d like to check it out as I have to do the same thing for my county.”

*Stacey Baumgarn:* At this time it’s not posted on our Web site because we’re still working through it. It will have two components, the policy piece and then I mentioned this energy action plan. The goal of the action plan is essentially to be that little roadmap so that each department within our county would be – we’d like them to set energy goals, energy reduction goals, and then we’ll use the energy action plan to help them come up with a strategy of how to do that. I’d be happy to share it once I’m finished and maybe Joel, somehow you can help me connect with that person or somehow I’d be happy to talk to them offline about it or share what I can.

*Joel Blaine:* Okay, yeah. I can give you what information I have for the person there. Leslie, it looks like this one is for you, “Is it possible to integrate the Energy Star Portfolio Manager with a building if your building’s utility data has not shown occupancy for a couple of years?”

*Leslie Cook:* So the building hasn’t been occupied?

*Joel Blaine:* That’s what it sounds like. It hasn’t been occupied for a couple of years.

*Leslie Cook:* Okay, sure yeah and I guess especially with large – or it may be a medium or small portfolio, you may have some buildings in your portfolio that aren’t being used right now. You certainly can enter that building into your Portfolio Manager account. You can enter test buildings in your Portfolio Manager account. It’s really your tool to use as it works for you. So as this building is not occupied – let’s say it’s an office building – you can put in the building characteristics, the square footage, meter names, even if they’re not in use right now. You can get it set up so when this building is occupied again, you can start to measure the performance.

In the commercial real estate market where occupancy rates vary quite a bit over the period of a year or a few years, we’ve got features allowing you or anyone using the tool to take those occupancy levels up or down for office buildings. So a building may have 50 percent vacancy rate one year and then the next year they’re up at 100 percent. You can track the performance of that office buildings and normalize for that change in occupancy rates. So I would say there’s no harm in getting it in while it’s empty so you’re ready to benchmark it once it’s up and running.

*Joel Blaine:* Great. Another one for Stacey, “What reporting features in Portfolio Manager did you find most useful for decision makers, green teams and individual staff within the building?”

*Stacey Baumgarn:* Thanks for the question. I have admit that’s why I’m personally excited to be a part of the Portfolio Manager initiative because I want to learn more about using the strength of the tool. For this point, we really were just using the energy performance score itself, so we probably weren’t using the tool it its full function, but just trying to hold up the score and say boy, a 38 is not something that we want to feel good about or publicize so let’s do what we can to rate that score. To this point, that had been enough. I think going forward, I do look forward to being able to use some of the other reports and functions within the tool and be able to provide just a variety of information for people. We’ll just kind of see – I just have to wait and see what questions come from the building occupants, too, because I want to do the best I can to just answer the questions that they have. What’s going to be the information that motivates them to keep going down this path and helps us improve? Well, we’ll just have to see what comes next.

*Joel Blaine:* Great. And Leslie, are there any reporting features that you think would be particularly helpful on top of that?

*Leslie Cook:* Yeah, yeah, thanks. I was just going back in my mind through all the feedback we’ve been getting from our public sector partners, and we know it shifts. It depends on what are your decision makers paying attention to right now? Are they paying attention to your carbon footprint? Are they reaching out to the community? Maybe now they’re more focused on financial performance and perhaps the utility cost report in Portfolio Manager, where you can show – just like Stacey had that nice, clean graph that showed the energy performance for over a number of years for one building, what is the cost to operate that building?

At the building level or square foot, how has that changed over the years based on the work that you’ve done to improve the efficiency. Perhaps that financial report is powerful for you. I would say also looking at that cash opportunity calculator online, if you’re looking to discuss future projects with your decision makers, you can put in your Portfolio Manager performance metrics like your energy use and your score, and you can calculate the payback period, you can calculate the cost of the way that hey, perhaps we’re paying 70 percent more to operate this building than we need to be right now. Why don’t we invest that into a new efficiency program and reap those benefits over all the years that we’re going to be operating it. So I might say that financial reporting right now may be the most top-of-mind for decision makers.

*Joel Blaine:* Great, great. Thanks for that. So it’s after 3:00, or 3:01 now my time. I think we’ll segue into one last question and then apologies to all of you who sent questions. We will follow up with those and have them e-mailed back to you and get it distributed that way. The last question is similar, “Can you predict cost savings in the future given a percentage goal of energy savings?” Maybe Leslie, that’s a question – does the tool have the capability of predicting cost savings into the future?

*Leslie Cook:* There is a future in Portfolio Manager where you can track your improvements and set goals. We didn’t cover that today, but if you come to one of our Portfolio Manager trainings or really if you just log into your own Portfolio Manager account and click on the Set Goals button, the feature will allow you to – it pulls up for you, in that building, what is the energy performance level, energy use and also if it’s available, what is the score. Maybe your target is going from a 38 to a 60. What would that mean in terms of energy savings and if you were tracking cost, what would that mean in terms of cost savings. Again, I have to go back to the cash opportunity calculator. I think that may have some helpful information, too.

*Joel Blaine:* Great, thanks. Okay well thanks everybody. Sorry we ran a few minutes over. If you would, we’d really appreciate your feedback on the poll provided at the end. Again, we will take all the questions that we received and generate some answers for those and send them back to you, so apologies if it didn’t get answered over the phone, but we will get back to you via e-mail. So we look forward to doing that in the near future. And thanks again to our presenters, you did a fantastic job. Thanks, guys, we appreciate your help and we’ll see you all soon.

*Leslie Cook:* Thanks, Joel. Thanks, Stacey.

*Stacey Baumgarn:* Thanks, bye.