

Rhode Island Infrastructure Bank Efficient Buildings Fund

Guidance on Submitting Your Energy Usage Baseline

You cannot manage what you do not measure. This premise is why the first step toward saving energy is analyzing the current energy consumption of your facilities. A comprehensive energy baseline typically consists of at least two years of consumption and expenditure data for each energy utility (electric, gas, oil, propane, etc.) for all the facilities managed by an entity.

Over the past three years, as part of the Rhode Island Public Energy Partnership, the Office of Energy Resources (OER) contracted with the University of Rhode Island Extension Outreach Center to complete energy baselines for all Rhode Island municipalities and public school districts.

In cases where we were able to connect with the municipality or school department, we attempted to collect all the necessary information to create facility profiles in ENERGY STAR Portfolio Manager, a free online energy monitoring tool developed by the U.S. Environmental Protection Agency. In addition to energy consumption and expenditure, this data includes account numbers, square footage, property use details, operating characteristics, etc. Portfolio Manager uses this information to calculate an energy use intensity (kBtu/ft²/yr) as well as greenhouse gas emissions for each building. In cases where we were not able to connect with the municipality or school department, we gathered more limited data from National Grid, but did not complete a Portfolio Manager profile.

If the applicant has had its baseline completed by URI, the applicant should access its Portfolio Manager account and follow the instructions under the “What to Submit” section below.

If the applicant needs assistance in accessing and/or updating its Portfolio Manager account, would like assistance in completing its baseline, or does not know the extent to which its baseline has been completed, please contact Kristina DiSanto from the URI Extension Outreach Center at kdisanto@uri.edu or 401-874-4524.

If the applicant has completed a baseline energy inventory on its own, please follow the instructions under the “What to Submit” section below.

If the applicant is a quasi-state agency, please contact Rachel Sholly with the OER at rachel.sholly@energy.ri.gov or 401-574-9121.

WHAT TO SUBMIT: Applicants should submit the information described below in both electronic form and in hardcopy as attachments to the application.

(1) Energy Usage Baseline: At least two (2) years of monthly consumption and expenditure data for each energy utility (electric, gas, oil and propane) for each facility managed by the applying entity. Data prior to 2010 should not be included. The baseline must include at least electric and natural gas information for each and every facility that is owned or operated by the applicant, not just those being considered for project financing in this application. We strongly recommend that the baseline also include oil and propane information for each facility, however, oil and propane information is only required for those facilities that are included in your application.

We encourage the use of ENERGY STAR Portfolio Manager to compile this submission, however, Microsoft Excel is also an acceptable submission format. If submitting through ENERGY STAR Portfolio Manager, the applicant should use the “Download Entire Portfolio” function in Portfolio

Manager to generate a file for this submission. “Download Entire Portfolio” can be found on the bottom right corner of the home page.

(2) Baseline Narrative: A narrative, no longer than one (1) page, outlining the major findings of the energy data baseline. The analysis should include notes on:

- Facilities with the highest energy consumption and/or expenditure
- Facilities with the highest energy use intensity and/or cost per SQFT
- Facilities that have a noticeable increase or decrease in energy consumption and/or expenditure over time
- Potential reasons why facilities are showing certain data trends

Generating Your Energy Baseline and Narrative

Information provided in this document will guide you to:

- (1) access your energy baseline in ENERGY STAR Portfolio Manager; and
- (2) write a baseline narrative.

Both your baseline and the baseline narrative are required components of the Application to the RI Infrastructure Bank’s Efficient Buildings Fund (EBF) Project Priority List.

IMPORTANT NOTE FOR SUBMITTING YOUR BASELINE

Please review each page of the EBF Application provided by the RI Office of Energy Resources (at <http://www.energy.ri.gov/RIEBF/>) to ensure that you have submitted all required materials in the correct format and to the correct person. You should not be submitting any application materials to URI.

SECTION 1: GENERATING YOUR ENERGY BASELINE

STEP 1. Setting up your Energy Star Portfolio Manager (PM) Account

A. Visit the Portfolio Manager Login Page

<https://portfoliomanager.energystar.gov/pm/login.html>

OR Google “Portfolio Manager Login”

B. Click “Create a New Account”

C. “Your Username”

Suggestion: Town or City of _____ OR _____ School Department
(Choose your town/city name, or whatever you would like)

D. “Your Password”

Needs to be at least 8 characters long

Needs to have lowercase letters

Needs to have uppercase letters

And/or special characters (such as *, #, %, etc.)

E. “About Yourself”

Choose a contact in your community that will have primary access to the account, and be in charge of account password and access through their email address. This email will be used to reset a password or receive and necessary updates about Portfolio Manager.

F. “About Your Organization”

Suggestion: Town or City of _____ OR _____ School Department
(Choose an Organization Name relevant to your community)

G. “Searchability in Portfolio Manager”

Make sure this is clicked on “Yes”

H. “Recovering Access to Your Account”

Choose two security questions and answers in the event that you forget your username and password.

STEP 2. Provide URI with your Account Information to Connect

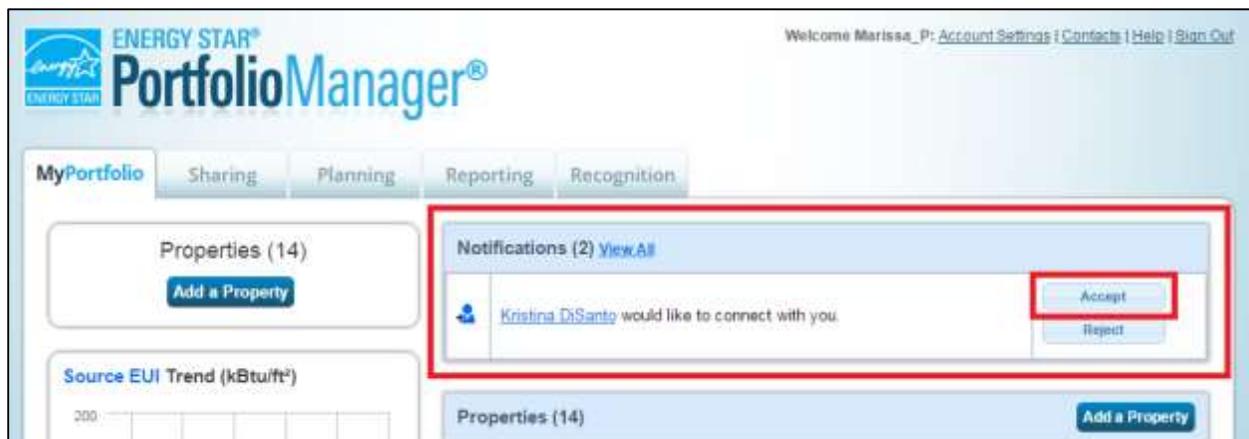
Once you have created an Energy Star Portfolio Manager account, please contact Kristina DiSanto at 874-4524 or kdisanto@uri.edu or Marissa Pereira at 874-2129 or marissa_pereira@my.uri.edu with the following information for the Portfolio Manager account you just created:

1. Contact Name
2. Username
3. Organization Name

STEP 3. Connect with URI

Once you have sent URI the account information listed in Step 2, URI will send you a request to connect. This request will appear on your homepage in the “Notifications” section.

Make sure you accept the request so we can share your baseline with you.
(See figure below on what the page should look like for this step)



STEP 4. URI Shares Buildings with you to Accept

Once you accept the connection request in Step 3, URI will share your facilities with you in Portfolio Manager. This will show up as a notification on your homepage. You need to click “Accept” for each facility listed in your “Notifications”.

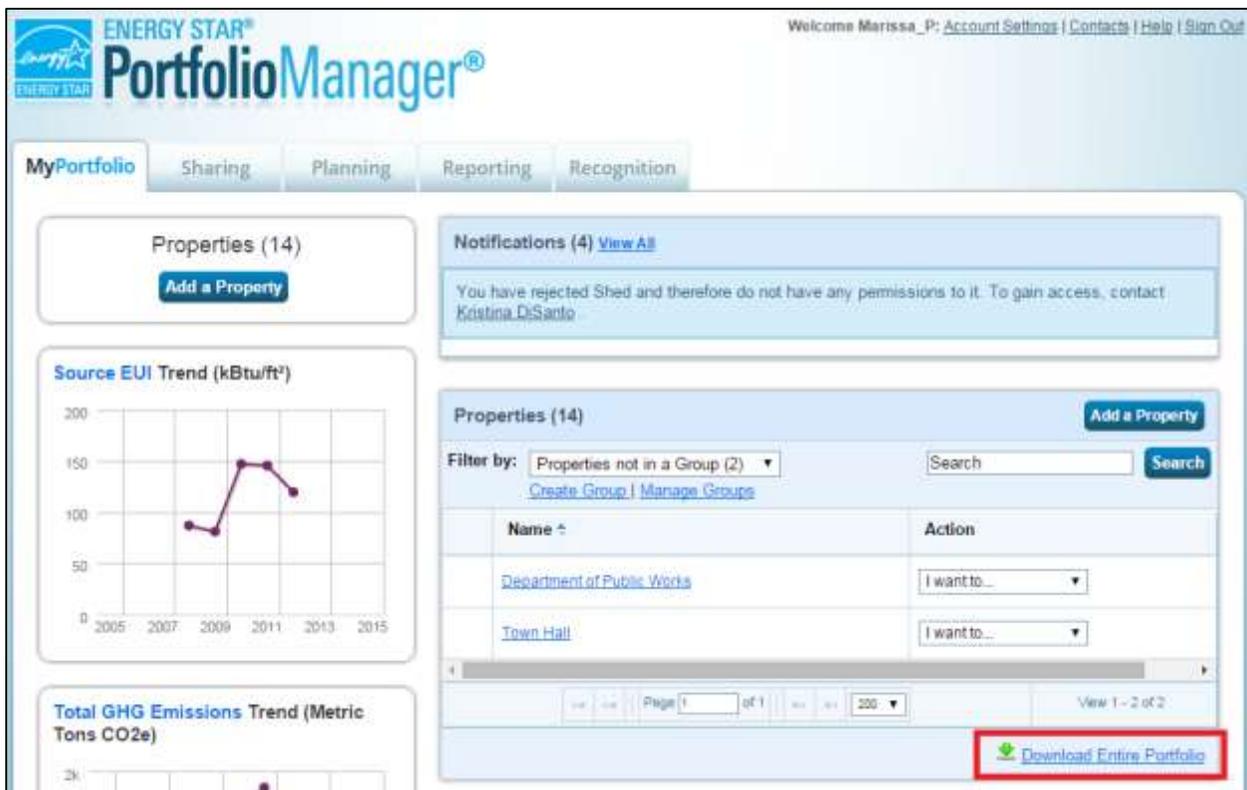
(See image below to learn how to accept a building share request)



STEP 5. "Download Entire Portfolio" to Submit with your EBF Application

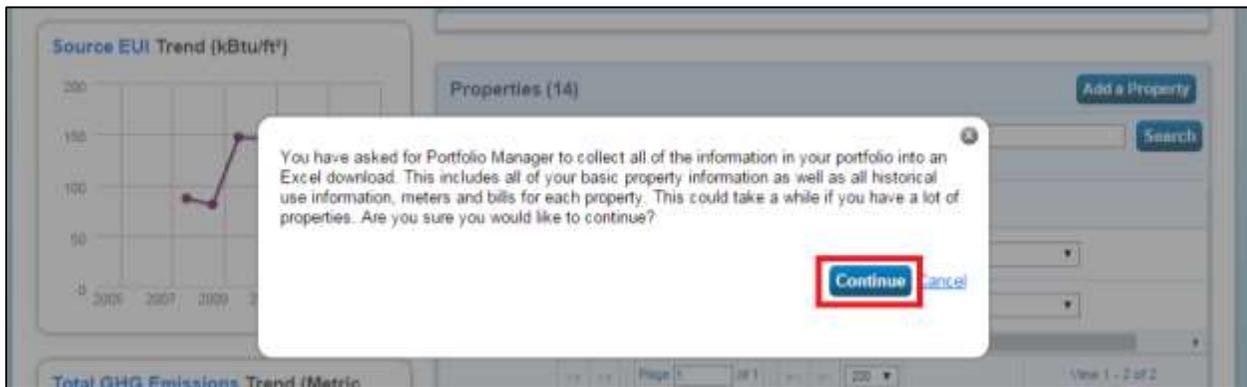
After you have completed Step 4 and accepted the share for each of your facilities, you may download the entire energy baseline to submit with your EBF application.

Visit your homepage on your Portfolio Manager account. Look to the bottom right portion of the "Properties" box, and you will see "Download Entire Portfolio". Click on this button.
(Example image of where button is located below)



Once you have clicked this button, you will see the image below pop up on your Portfolio Manager Homepage.
(Image of the pop up that will appear is shown below)

Click **“Continue”** and your portfolio will begin to download to your computer in Excel format.



When your energy baseline portfolio has downloaded to your computer, you may open it using Microsoft Excel, the download should look similar to the one below listing all of your facilities.

This Excel workbook has multiple tabs. These tabs show your Properties List, Property IDs (provided by Portfolio Manager), Property Uses, Property Use Details, Meter List, and Meter Consumption Data.

Property Name	Portfolio Manager ID	Street Address	Street Address 2	City/Municipality	State/Province	Other State/Province	Postal Code	
My Portfolio: Marissa Pereira								
	01/07/2016 09:47 AM EST							
Total Properties: 14								
Department of Public Safety	4341543	1 Main St		Kingston	Rhode Island		02881	Unite
Library	4332312	5 Main St		Kingston	Rhode Island		02881	Unite
Public Safety Building	4334133	6 Main St		Kingston	Rhode Island		02881	Unite
Public Safety Building	4338193	7 Main St		Kingston	Rhode Island		02881	Unite
Town Hall	4332349	13 Main St		Kingston	Rhode Island		02881	Unite
Town Hall	4338146	14 Main St		Kingston	Rhode Island		02881	Unite

IMPORTANT NOTE ON FORMAT FOR SUBMITTING YOUR BASELINE

Remember to review each page of the EBF Application provided by the RI Office of Energy Resources to ensure that you have submitted all required materials in the correct format. Just like all other application materials, your energy baseline needs to be submitted in both hard copy and electronic copy. Please be sure to save your excel file as an Excel Workbook (NOT A PDF) and that the printed hard copy contains all the information (AKA each tab) found in the electronic file. Please save your Excel file with a relevant document name (i.e. “Energy Baseline_Customer Name”).

SECTION 2: WRITING YOUR BASELINE NARRATIVE

Your Baseline Narrative should be no longer than one (1) page and should outline the major findings of the energy data baseline. The analysis should include notes on:

- Facilities with the highest energy consumption and/or expenditure
- Facilities with the highest energy use intensity and/or cost per SQFT
- Facilities that have a noticeable increase or decrease in energy consumption and/or expenditure over time
- Potential reasons why facilities are showing certain data trends

Helpful Hints When Writing Your Baseline Narrative

- The first step is to review your Portfolio Manager account. Take a look through each property that was shared with you, review the reports available to you on your Portfolio Manager “Reporting” tab, and consider any gaps in your data and if and how you can fill those gaps.*
- Your narrative should demonstrate that you have reviewed your baseline for ALL buildings (not just those applying for project funding). Be sure, therefore, to look at your entire portfolio when considering notes such as facilities with the highest energy consumption or facilities with the highest energy use intensity.
- Make use of numeric values that you can find in your Portfolio Manager account.
- The narrative should justify why you are applying for project funding in specific sites. Be sure, therefore, to include several reasons why your facilities are showing certain data trends. For example, you can look to your audit reports that suggest a building may have inefficient lighting or poor insulation. This could be one of the “potential reasons why facilities are showing certain data trends.”
- You may want to look at your community’s total consumption (the aggregate consumption of each facility). You could use these values to understand how much your community could potentially save with 5%, 10%, or 20% total community-wide energy reductions.
- **Energy Use Intensity** is defined as your building’s total energy usage (kBtu) per square foot.

**The URI team can schedule a meeting with you after the application period to discuss your Portfolio Manager account in detail and provide an in-person training on how to use the tool for maintaining the data set and utilizing reporting features.*