



THE PORTFOLIO MANAGER UPGRADE PROJECT

LISTENING SESSION FOR THE BOMA
SUSTAINABILITY COMMITTEE



April 22, 2024

*Supported by funding from the Inflation Reduction Act of 2022 to advance the goal of
reducing greenhouse gas emissions from commercial and residential buildings*

Agenda

- Welcome and Introductions (10 min.)
- Overview of Enhancements Currently Envisioned as Part of the Portfolio Manager Upgrade Supported by the Inflation Reduction Act of 2022 (5 min.)
- Focused Discussion on Specific Enhancements (50 min.)
- Open Discussion (20 min.)
- Wrap-Up and Adjourn (5 min.)

Housekeeping

- The session is being recorded.
- A copy of the slides will be distributed after the session.
- If you wish to speak during the discussion, use the “Raise Hand” function. We will call on you, and you can come on video (if you wish).
- You can also submit questions/feedback via the Chat window.
- Please keep your line muted if you’re not speaking.
- We will have a few quick-answer questions throughout the session where you can put your answer in the Chat box.
- Feel free to send us additional comments/questions following the session.

Today's Participants from the ENERGY STAR Team

- Cindy Jacobs, U.S. EPA, ENERGY STAR Commercial & Industrial Branch, Branch Chief
- Leslie Cook, U.S. EPA, ENERGY STAR Buildings Branch, Portfolio Manager Team Lead
- Cyndi Veit Maia, U.S. EPA, ENERGY STAR Buildings Branch, Portfolio Manager Team
- Evan Bowman, Allyson Greenberg, and Andrew Schulte, ICF, working in support of ENERGY STAR

“Quick Response” Question

What is/are your primary use(s) for Portfolio Manager?

Please enter your response into the Chat window.

Overview of Proposed/Envisioned Enhancements	
Category	Enhancement Item
Tracking for Building Performance Standards (BPS)	Tracking progress against building performance standards
	Tracking compliance status with benchmarking/BPS Laws
	Additional functionality for program/policy administrators
Emissions Tracking	Use of custom emissions factors/forecasting emissions
	Refrigerant tracking
	Green Power tracking
Managing Your Portfolio	Updates to reporting functionality
	Expanding goal-setting/tracking functionality
	Updates to property sharing process
Additional Items	UI Refresh and the Portfolio Manager Lite interface
	Building system/equipment tracking
	Meter tagging
	Spanish interface and user support
	New API enhancements
	Other enhancements yet to be identified through stakeholder engagement

“Quick Response” Question

What items do you think should be priorities for the Portfolio Manager Upgrade?

These can be from the list we just presented, and/or additional ideas that you'd like to raise.

Please enter your response into the Chat window now, and feel free to add further input throughout the session.

Focused Discussion on Specific Enhancements

Tracking for Building Performance Standards (BPS)

Tracking Progress Against Building Performance Standards

- **Intent:** enable building owners to more easily assess and/or map their progress towards meeting performance standards (GHG- or EUI-based), as well as interim targets.
- **Potential areas for feedback:**
 - What do you need as building owners to ensure that you are “on track” to meet published performance requirements? How are you managing this outside of Portfolio Manager?
 - What kind of integration would you want to see between this functionality and the Building System/Equipment Tracking functionality?
 - Should this functionality entail both tracking of historical performance trends and forecasting of future performance? Or is one more important than the other?
 - Is it useful to see how a given property is performing against different jurisdictions' BPS targets?

Tracking Compliance with Benchmarking and/or BPS Laws

- **Intent:** enable building owners to more easily track the compliance status of their individual properties/portfolios.
- **Potential areas for feedback:**
 - Is this functionality valuable if it is user-defined, rather than being automatically linked to jurisdiction-specific covered building lists?
 - What (if any) limitations could/should Portfolio Manager place on marking a property as “in compliance” for a given year (since this is a determination made by local/state jurisdictions, not Portfolio Manager itself)?

Emissions Tracking

Greenhouse Gas Emissions Enhancements

- **Use of Custom Emissions Factors/Forecasting Emissions:** enhance GHG emissions-tracking functionality by adding “market-based” emissions metrics and the ability to assign “custom” emissions factors to indirect fuel types; integrate GHG “forecasting” functionality within Portfolio Manager (similar to the Building Emissions Calculator).
- **Refrigerant Tracking:** allow users to track onsite refrigerant use and allow these to be included within a property’s calculated Direct Emissions.
- **Green Power Tracking:** streamline and enhance existing functionality by which users account for the purchase of onsite (i.e., solar) and offsite green power (i.e., utility green power products, PPAs, unbundled RECs, or other).

What are your current and future emissions tracking goals that you’d like Portfolio Manager to support?

Managing Your Portfolio

Updates to Reporting Functionality

- **Intent:** make Reporting functionality more powerful, while also maintaining ease of use across multiple use cases (e.g., internal/corporate reporting; data submission for compliance purposes); expand/streamline linkages to other reporting protocols such as GRESB, CDP, etc.
- **Potential areas for feedback:**
 - What features within the “Reporting” tab of Portfolio Manager are you using most frequently and/or which are most important to you?
 - What are the most common kinds of visualizations or data displays that you are building out based on Reporting data from Portfolio Manager?

Expanding Goal-Setting/Tracking Functionality

- **Intent:** take a “fresh view” of the existing “Goals” tab to ensure that it offers maximum value and ease of use; centralize the tracking of new metrics introduced through this enhancement project.
- **Potential areas for feedback:**
 - What specific “targets” or “goals” do you track regarding property/portfolio performance that are not currently tracked within Portfolio Manager?
 - Where/how are you tracking these, absent Portfolio Manager functionality?

Updates to the Sharing Process/Functionality

- **Intent:** streamline the “Sharing” process to reduce the number of steps and eliminate common areas of user confusion.
- **Potential areas for feedback:**
 - What aspects of the current Connection/Sharing functionality do you like and should be emphasized or enhanced?
 - What aspects of the current Connection/Sharing functionality do you find to be confusing or complicated and should be streamlined or de-emphasized?

Additional Items

Additional Enhancement Items

- **User Interface Refresh:** Holistic update to modernize the look/feel of the user interface, streamline navigation, and facilitate planned enhancements.
- **Portfolio Manager “Lite” interface** (simplified interface aimed at users who will only use Portfolio Manager annually for mandatory reporting, or other audiences that don’t need to be “power users” of the tool)
- **Building System/Equipment Tracking:** allow users to track details regarding building systems or equipment to inform plans for retrofits or replacements to reduce emissions or to pursue electrification. Details may include nameplate information, fuel source, date for end of useful life, vendor estimates, etc.
- **Meter “Tagging”:** enable new/additional meter-level metadata to allow greater specificity in metrics calculation, goal tracking, and reporting
- **Spanish-language User Interface and User Support:** enhance the usability and accessibility of Portfolio Manager for Spanish-speaking users (whether in the U.S. or other countries).
- **New API Enhancements:** reflect updates to the front-end user interface; enhance/improve the back-end architecture to improve the experience of 3rd party web services users. Will include a new Test UI for API users, a longtime request from partners.

Open Discussion: Other Enhancements

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Guiding Questions for New/Additional Enhancement Items

- What is the feature/concept you'd like to see in Portfolio Manager?
- What is the anticipated use case for this feature? What programmatic need(s) does it support?
- How are you currently accomplishing this use case in the absence of the desired functionality within Portfolio Manager?

Wrap-Up and Adjourn

Thank You for Participating and Providing Feedback!

- To make additional comments, please email: veitmaia.cynthia@epa.gov
- Follow the progress of the Portfolio Manager Upgrade at:
https://www.energystar.gov/buildings/benchmark/portfolio_manager_upgrade

