HOW TO CLASSIFY SENIOR CARE SPACE IN PORTFOLIO MANAGER

EPA's online energy management and tracking tool—Portfolio Manager—allows you to track and assess the energy performance of communities that house and provide care and assistance to elderly residents.

A senior care community is eligible to receive an ENERGY STAR score if at least 50 percent of the total number of residential units are considered assisted living and/or skilled nursing. Continuing care retirement communities with predominantly independent living units may be eligible to receive an ENERGY STAR score under this model if certain building characteristics are met. The following illustrations provide guidance on how to define a senior care property for energy performance benchmarking within Portfolio Manager.

### *Senior Care Communities Eligible to Receive a Score in Portfolio Manager*
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The graphics below depict the three ways in which a senior care community can be benchmarked using the ENERGY STAR energy performance scale.

A stand-alone senior care building where more than 50% of the units are assisted living and/or skilled nursing:

A senior care building may be a diverse space that includes independent living, assisted living, dementia care, skilled nursing, and common areas such as dining and recreational rooms.

At least 50 percent of the total number of residential units must be considered assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

Select the senior care space type in Portfolio Manager and enter the total square footage and energy usage of the entire building.
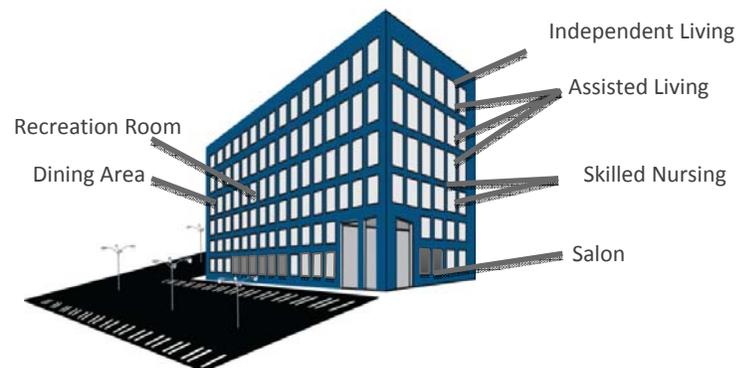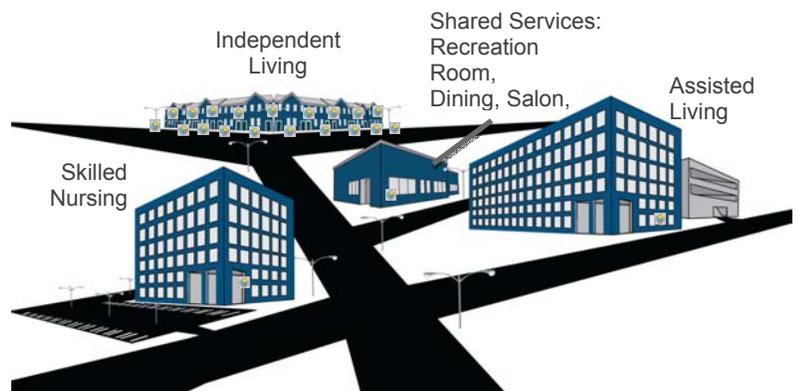

A multi-building community where more than 50% of the units are assisted living and/or skilled nursing:

A community includes all buildings that are connected by corridors or walkways in close proximity to one another.

At least 50 percent of the total number of residential units on campus must be assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

Select the senior care space type in Portfolio Manager and enter the square footage and energy usage of all buildings on campus, including any individual electric meters that might be billed to specific independent living apartments.

A multi-building community where 50% or more of the units are separately metered independent living:

For communities in which 50% or more of the units are independent living (IL) but the IL buildings are separately metered stand-alone buildings, a valid rating can be generated only by fully excluding the IL buildings from the rest of the campus.

To properly enter the community in Portfolio Manager, aggregate the square footage and energy usage of all skilled nursing and/or assisted living buildings including buildings with support functions (e.g. offices, dining, recreation, common areas). The rating will apply only to that part of the campus.

Buildings that are used by all residents must be included in the benchmark.

Independent Living

Shared Services: Recreation Room, Dining, Salon, Chapel, etc.

Assisted Living and/or Skilled Nursing

Senior Care Communities NOT Eligible to Receive a Score in Portfolio Manager

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Communities that are predominantly independent living and do not have separate or sub-meters:

If 50 percent or more of total units in a senior care community are independent living (IL) that are not located in a stand-alone building with separately metered energy use, then the community is not eligible to use the senior care space type in Portfolio Manager.

If more than 50 percent of the independent living units are located in a multi-tenant building (e.g. townhouse, condominium, apartment), communities should select the "Multifamily Housing" space type in Portfolio Manager to benchmark independent living buildings.

Buildings benchmarked as "Multifamily Housing" will not receive a score on a 1-100 scale, but the building will receive a weather-normalized energy use intensity. See Multifamily Housing Quick Reference Guide for more information.


Independent Living

Independent Living

Shared Services: Recreation Room, Dining, Salon, Chapel

Assisted Living
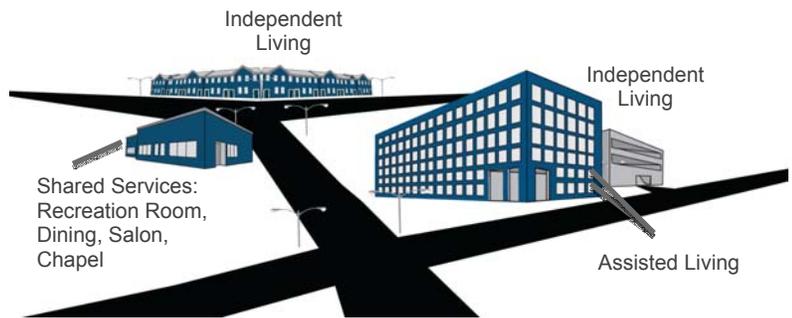
Residential retirement communities or villages:

If a retirement community or village is comprised of entirely residential homes and townhomes, it is not eligible to use Portfolio Manager.

If the community has already been built, it can use the ENERGY STAR Home Energy Yardstick for each individual home to assess energy performance and educate residents on energy savings opportunities.

If the community is still in the design phase, it can leverage the ENERGY STAR New Homes program and guidance on designing homes that qualify for ENERGY STAR for New Homes recognition.

Clubhouse
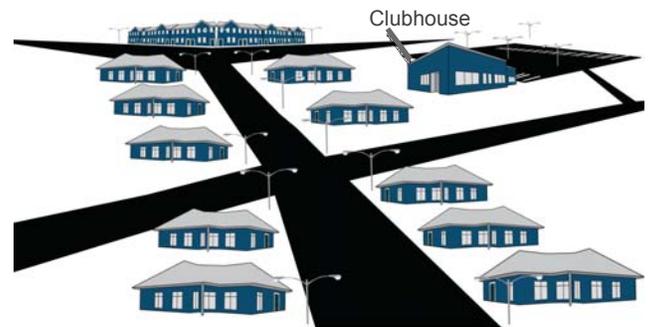
Other Spaces Associated with a Senior Care Building or Community
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While the majority of the space uses in a senior care building or community must be aggregated and classified under "Senior Care" (including office space, exam rooms, retail areas, etc.), there are three spaces that should be aggregated and classified separately within the property's benchmark:

1. Parking Lots and/or Garages

If the property has parking lots and/or garages included in the energy use, enter the characteristics of the parking garage under the "Parking" space type, including gross square footage.

Note: If the parking or garage space is sub-metered, do not enter the square footage and energy use in Portfolio Manager.

2. Data Centers

If the property has a data center, enter the characteristics of this space under the "Data Center" space type. A data center is for sophisticated computing and server functions. It should not be used to represent a server closet or computer training area.

3. Swimming Pools

If the property has a swimming pool, enter the characteristics of this space information under the "Swimming Pool" space type.
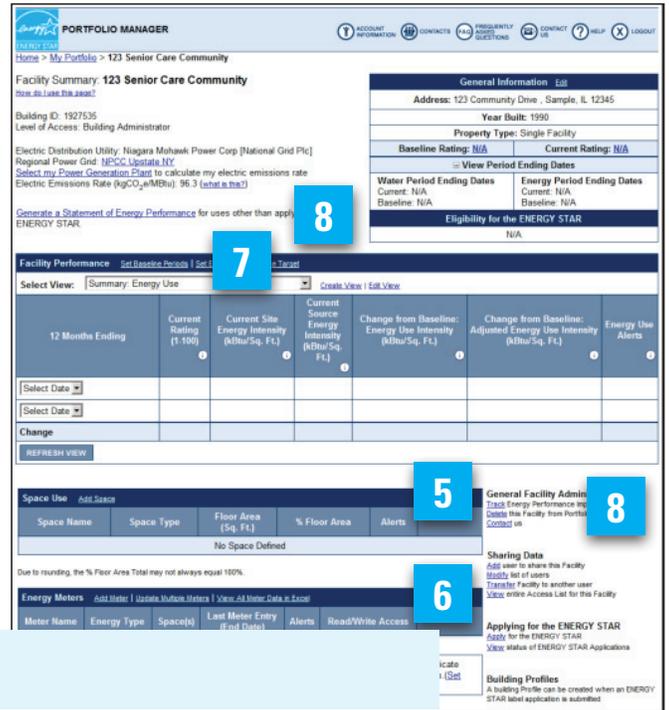
Benchmark Your Energy Performance

Use the ENERGY STAR® energy performance scale within Portfolio Manager to evaluate the energy performance of your senior care communities on a scale of 1–100. Earn a score for all of your communities and update the data regularly to take control of your energy costs. See top of page two for eligibility and data needed.

USE PORTFOLIO MANAGER STEP-BY-STEP

STEP	ACTIVITY	ACTION
1	Access Portfolio Manager	http://www.energystar.gov/benchmark Go to the Portfolio Manager Login section.
2	Access your account ■ Create a new account ■ Login to an existing account	■ Click REGISTER, next to NEW USER. ■ Enter user name and password and click LOGIN.
3	Add a new facility	Click ADD A PROPERTY.
4	Enter general building data	Enter data and click SAVE.
5	Enter space use data	Go to "Space Use" section and click ADD SPACE. ■ Enter a facility name and select the SENIOR CARE FACILITY space type. Click CONTINUE. ■ Enter space data. Click SAVE. *Repeat for all space types (e.g., parking lots and/or garages, swimming pools)*
6	Enter space use data	Go to "Energy Meters" section and click ADD METER. ■ Enter Meter name, type, units. Click SAVE. ■ Enter number of months and start date. Click CONTINUE. ■ Enter energy use and cost. Click SAVE. *Repeat for all space types*
7	Review and interpret results	Go to "Facility Performance" section and review your results. Guidance is provided on page two of this guide.
8	Manage account and apply for recognition	Share data, generate a Statement of Energy Performance, apply to earn the ENERGY STAR, create a building profile, and perform other administrative tasks.

www.energystar.gov/benchmark

ELIGIBILITY CRITERIA

- At least 50 percent of the units must be assisted living and/or skilled nursing
- Less than 50 percent of the units can be independent living
- Gross square footage of 5,000 or greater
- Occupied for at least 11 of the last 12 months

Continuing care retirement communities with predominantly independent living units may be eligible to receive an ENERGY STAR score if certain building characteristics are met. See "How to Classify Your Senior Care Space" posted at www.energystar.gov for additional guidance.

RATING INTERPRETATION

Establish a baseline for all communities in your portfolio, then set improvement goals and create an action plan. Use the guidance below to determine the appropriate next steps.

1–49 Greatest opportunity for improvement. Investments in new equipment, combined with aggressive low-cost operations and maintenance practices, could have the greatest impact on your bottom line.

50–74 Significant opportunity to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings.

75–100 Opportunity to gain recognition and demonstrate best practices. Continue to improve and maintain superior performance by focusing on operations and maintenance.
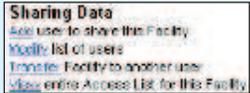
HELPFUL HINTS

- Enter 12 consecutive months of energy data for all fuel types (e.g., electricity, natural gas) without gaps in time.
- When entering data, there is no need to include commas or other punctuation.
- When inputting a facility's energy use, be sure to select the correct units of measurement.
- **ACCOUNT INFORMATION** — Change your password or user profile.
- **CONTACTS** — Maintain contact information for your energy team.
- **FREQUENTLY ASKED QUESTIONS** — View online answers to Frequently Asked Questions.
- **CONTACT US** — E-mail the system for technical assistance.
- **HELP** — Access online user-support information.

DATA NEEDED

- Building or Community Address Including ZIP Code
- Year Built
- Gross Floor Area
- Total Number of Units
- Average Number of Residents
- Total Resident Capacity
- Workers on Main Shift
- Number of PCs
- Number of Commercial Refrigeration/Freezer Units
- Number of Commercial Washing Machines
- Number of Residential Washing Machines
- Number of Residential Electronic Lift Systems
- Percent of the Gross Floor Area that is Cooled
- Percent of the Gross Floor Area that is Heated

FEATURES

- **Consolidate accounts.** From the Facility Summary page, go to "**Sharing Data**," click "**Transfer**."
- **Share facilities across accounts.** From the Facility Summary page, go to "**Sharing Data**," click "**Add**."
- **Group facilities within an account.** Determine groups (e.g., region, facility type). From the My Portfolio page, click "**Create Group**."
- **Generate a Statement of Energy Performance.** Use it as a management report and as a transactional document. Also use it to apply to earn the ENERGY STAR if eligible. From the Facility Summary page, click "**Generate**" (see **8** page one).

www.energystar.gov/benchmark

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