

Energy Use Disclosure Summary Sheet

Overview

The following disclosure is comprised of three documents that are generated by the EPA's ENERGY STAR® measurement and verification tool, Portfolio Manager (ESPM): the Statement of Energy Performance (SEP), the Data Checklist, and the Facility Summary. These are standardized documents designed to provide insight into the energy use of a building under the space utilization and operational characteristics that it has been operating under for the past 12 months. This disclosure includes metrics for overall building energy use, as well as a detailed description of the conditions that were input to ESPM to generate these metrics.

Overall Building Metrics

There are two metrics that are used to report overall building energy use, the ESPM rating and the Energy Use Intensity (EUI).

The ESPM rating compares a building to a statistically representative national sample of similar buildings. A rating of 50 indicates that the building's energy consumption is less than 50 percent of all similar buildings nationwide. Some buildings don't have a statistically valid representation in ESPM, and won't be given a rating. The EUI is a unit of measurement that describes a building's energy use. EUI represents the energy consumed by a building relative to its size.

Statement of Energy Performance

This document is appropriate to be given as the first page of the disclosure. The SEP is a standard report generated by ESPM that is designed to communicate information about a building's energy performance in a format that is both understandable and easy-to-use in business transactions. The identity and location of the

building being evaluated is reported on the top of the page. On the left side of the page, the age, size, and rating of the building are given, followed by summaries of energy use and greenhouse gas emissions. On the right side, there is a space for a licensed professional to certify the accuracy of these data. This certification is not required to meet disclosure requirements.

Data Checklist

The Data Checklist is a standard report generated by ESPM that is designed to provide an at-a-glance summary of a property's physical and operating characteristics. This document allows you to review the way the space is being used (i.e., open office), as well as the hours of occupancy to verify that the overall ratings shown in the SEP are applicable to the real-world operation of the building. The checklist also summarizes the conventional and renewable energy being used within the facility by fuel type. At the end of the document, there is a space for a licensed professional to certify the input data, if desired.

Facility Summary

The facility summary gives a brief review of the data presented in the SEP and the Data Checklist and compares the energy use of the building as it is currently operated against previous performance (if available), the score required for an ENERGY STAR® label, and the average national energy use for a building with the same characteristics. There is also a brief section devoted to cost and greenhouse gas emissions associated with these energy uses.

Unratable Buildings

There are several conditions that could cause a building to be unratable. This does not mean that

the building has better or worse energy efficiency than comparable buildings.

Evaluating Unratable Buildings

Evaluating the EUI metric for an unratable building against the median EUI for the building's space type is another way to gauge relative energy use. The following table gives median EUI values for space types within the state of California. EUI is expressed in units of thousands of BTUs (source) per square foot that are consumed in a year. A detailed discussion of

source and site energy use can be found on the ESPM website.

Use of this table provides a basis for comparing energy use within an unratable building to the median energy use within California for that set of space types. This does not, however, account for variations in major factors affecting building energy use such as occupancy, worker density, computer equipment, or climate. The space types whose energy use is significantly impacted by climate are indicated with an asterisk below.

Building Space Type	Median EUI kBTU square foot-yr
Education – Day Care or Preschool	66*
Education – Elementary School	92*
Education – Middle / Secondary School	119*
Education – Vocational or Trade School	83*
Convenience Store	923
Liquor Store	456
Small Grocery	483*
Specialty / Ethnic Grocery	457
Supermarkets	544
Clinic / Outpatient	223
Hospital	484
Medical Laboratory	253
Medical Office	158
Nursing Home	221
Data Processing / Computer Center	611
Laboratory / R&D Facility	571
Software Development	248
Lodging – Hotel	176*
Lodging – Motel	154*
Lodging – Resort	276*
Office / Bank	186
Insurance / Real Estate	149
Light Manufacturing	129*
Fire / Police Station	183

Building Space Type	Median EUI kBTU square foot-yr
Public Assembly – Health / Fitness	310
Public Assembly – Library / Museum	174
Public Assembly – Movie Theater	235
Public Assembly – Other	299
Religious	66*
Theater	133
Fast Food Restaurant	1148
Table Service Restaurant	749
Other Restaurant	712
Bar	367
Auto Sales	221
Department / Variety Store	208
Enclosed Mall	259
Other Retail	148*
Big Box Retail	193*
Strip Mall	147
Gas Station	94
Gas / Convenience Store	1162*
Other Services	158
Conditioned Warehouse	98
Unconditioned Warehouse	51
Refrigerated Warehouse	289
All Other	287*

For a detailed rating that is based on the above California EUI values and major factors (e.g., occupancy, climate, worker density, etc.), please go to www.energy.ca.gov/ab1103/CACalculator.html

Other Rating Systems and Standards

In addition to the disclosure methods detailed above, national and regional organizations have provided checklists and standards for disclosure that provide a high level of detailed information on building operations. Examples include, but are not limited to, the ASTM checklist E2797-11, American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) Standard 100, ASHRAE bEQ and the California Commissioning Collaborative (CCC) Existing Building Commissioning Toolkit.

