

ENERGY STAR Portfolio Manager (ESPM) FAQs

What is ENERGY STAR Portfolio Manager?

ENERGY STAR Portfolio Manager (ESPM) is a <u>free tool</u> managed by the U.S. EPA and Department of Energy (DOE) that enables real estate investors, owners, and managers to track, benchmark, and understand the energy and environmental performance of buildings in comparison to peers. Launched in 1999, ESPM is widely adopted by the real estate industry and often plays an important role in energy management and sustainability efforts.

What functions does ENERGY STAR Portfolio Manager provide for the real estate market?

Over the years, ESPM has evolved to fulfill a number of roles in the CRE landscape, including the following:

- **Energy Performance Benchmarking** Users can input energy consumption and building space characteristics and generate a 1-100 score that conveys the overall energy efficiency of that property in comparison to market averages.
- **ENERGY STAR Certifications** Buildings with a score of 75 or higher can apply for ENERGY STAR Certification, communicating to the market a superior level of energy performance.
- **Data Archiving** Many real estate organizations utilize ESPM as a data repository to collect or store energy, water, and waste information on their portfolios, or receive whole-building data updates from local utility providers.
- **Compliance Reporting** Numerous market compliance and regulatory frameworks such as Fannie Mae or Freddie Mac Green Loans, or city and state Building Performance Standards (BPS) leverage ESPM for reporting needs.

Additionally, ESPM offers tools and capabilities to track renewable energy use and GHG emissions and is often referenced in other sustainability programs such as LEED, IREM, GRESB, or Green Globes.

What is happening with ENERGY STAR Portfolio Manager?

On May 6th 2025, several media outlets reported that the entire ENERGY STAR program - including ESPM - was targeted for elimination. There are few specifics, and it is unclear how this might occur or how soon. A likely scenario is that this would happen through the elimination of funding in the 2026 Federal budget, which is currently being negotiated in Congress. Should this occur, it may mean ESPM becomes unavailable as soon as the 2026 fiscal year begins on October 1, or sooner. But again, no specifics are confirmed. For now, ESPM is still operational and functioning normally.



What is Conservice doing to prepare for a potential disruption?

We recognize the impact that a disruption could mean for the real estate industry and have initiated a number of actions in preparation. We have established an ESPM Task Force to coordinate and manage our efforts. Our product and technical teams have accelerated efforts to synchronize, archive, and protect our clients' data, and we are assessing the potential for data feed disruptions from local utility providers and reaching out directly to them to develop workarounds. In addition, we are coordinating with other organizations and stakeholder groups to ensure the long-term viability of ESPM and its core functions.

I am a Conservice client, is my data at risk?

Clients who subscribe to our S2 service are best protected in the event of a disruption to ESPM. Your data and ESPM information are archived and backed up on the Goby software (within our AWS and Salesforce platforms). Synergy and Capturis customers will also have protected data, although it may be in a format that requires setup/transposition to ESPM or a future tool. Each situation will may vary depending on the services and support you receive from Conservice, and we are committed to resolving any concerns or risks to the best of our abilities.

How up to date is my archived ESPM data?

Our technical teams initiated a complete data backup of all S2 and Synergy client data the week of 3/24, and anticipate conducting periodic updates for the immediate future. Automatic updates will continue for S2 customers unless there is a disruption to ESPM, according to the following schedule:

- Consumption data: Monthly
- · Property details & attributes: Monthly

If you have concerns or would like to inquire about the state of your organization's data specifically, please contact espmsupport@conservice.com.

How will Conservice communicate updates & information during a ESPM disruption?

As new information becomes available, Conservice will provide updates through all of our regular communication channels, including via the Goby platform, our Account and Customer Success Managers, direct emails, and social media. Be sure to follow Conservice and our team on <u>LinkedIn</u>, and make sure you are subscribed to the <u>ESG Alpha</u> newsletter. Additionally, you can always contact us at <u>espmsupport@conservice.com</u>.



I am not a Conservice client, what can Conservice do to help me?

Contact us today to evaluate pathways available to you. Setting up your building data on our Goby platform may be a prudent contingency option; our team can help you navigate the best next steps at no cost to you. Please contact espmsupport@conservice.com.

What else can I do to further prepare?

In addition to having Conservice archive your data, you might consider building your own backups as a contingency. You can download your portfolio data from ESPM into MS Excel or other "flat files". Inventory and map your data flows into and out of ESPM and assess whether there is an alternative method to secure that information should ESPM go offline. At minimum, you'll want to ensure continuity and availability of the following:

- · Monthly cost and consumption data for energy, water, and waste
- Historical building space-use characteristics
- Historical ENERGY STAR scores
- Whole-building data feeds from local utilities or other sources (such as bill-pay providers)
- Renewable, clean-energy, REC, or GHG data
- · Property team and building account information and contact details

If you are uncertain how to proceed or evaluate your risk, Conservice has a strategic consulting team with deep expertise who can assist.

What will happen to ENERGY STAR Certifications?

As of today, Certifications are still being processed, albeit at a slower pace than normal. Should ESPM be disrupted, we expect Certifications will be paused.

What will happen to BPS compliance reporting, LEED certifications, GRESB, & other programs that leverage ESPM?

This is difficult to predict and depends on the nature of the disruption, how much information we have, and whether we can expect a short-term or long-term outage. If we know the disruption will be short-term, Conservice expects that many programs may pause or be on hold until service resumes. For longer-term disruptions, we anticipate that the market will eventually seek out alterative compliance pathways, workarounds, and even replacement tools if necessary. As we learn more Conservice will share information through our many communication channels. Conservice is directly in touch with the EPA, IMT, GRESB, and other pertinent organizations on behalf of our customers in order to be in a position to make further recommendations.



What about my historical data? How far back can I access?

Historical data will be stored for the amount of time based on the terms and conditions in the service level agreement. There are many variables involved with historic data availability, but typically profiles are set up with two years of historical data and that data remains accessible for a significant period of time so that trends can be identified. ESPM holds data going back up to dozens of years, so downloading the entire profiles will also extract the full dataset that is in ESPM.

If ENERGY STAR Portfolio Manager (ESPM) goes down, where can I see/access my data?

- Customers with our S2 services have data that can be seen by logging into Goby
 https://platform.gobyinc.com/s/login/ and accessing these specific reports: Certifications, ENERGY
 STAR Details, and Use Analytics.
- For non-S2 Conservice customers, data is saved in our bill payment platform (OneStop) and/or our ENERGY STAR Portfolio Manager data extractions. Conservice pulls and saves ESPM data from all profiles in our ENERGY STAR accounts monthly. The best way to ensure a customer has all their data is for the customer to have their own ENERGY STAR username that is connected to all profiles (a best practice in any case) and to use the "Download your entire portfolio to Excel" button on the left side of the main ENERGY STAR Portfolio Manager MyPortfolio tab.
 - o If you need to make a new username go to https://portfoliomanager.energystar.gov/pm/home to make a new username and send an email request to the Conservice contact to share your specific profiles with your username. Be sure to send an ESPM connection request to usernames GOBYENERGYSTAR and SYNERGY-CONSERVICE so our team can accept the connection and share the profiles.

My organization is not a Conservice customer, can you still save our data in ENERGY STAR Portfolio Manager (ESPM)?

Yes, our team can hold on to non-customers' data for safekeeping. There are a few simple steps to connect and share an ESPM profile, but once shared then we can include this data in our regular backups:

- Send a connection request to Conservice ESG (ESPM username GOBYENERGYSTAR). Conservice will need to accept the connection in order for the profile to be shared.
- To expedite the process, send an email to espmsupport@conservice.com and let us know you sent the connection request.
- Once connected, share the profile(s) with Conservice ESG at any level of access including Read Only and the profile(s) will be included in our regular backups.



What if I want my data in the possession of my organization in addition to it being safe and protected in Goby?

- Customers can login and download the data Conservice has on file at any time either in OneStop or within Goby; applicable bill images are also accessible here.
- See above method of extracting data from ESPM with a company's username.

What about whole building aggregate data pushed directly from the utility provider into ESPM? How can I access that to ensure I have it?

- For S2 customers, the Conservice ESG team pulls this data back at regular intervals and you will be able to see the data in Goby the weekend after the upload.
- For non-S2 customers the whole building data is saved at the utility provider level, in ESPM, and in
 the monthly extracted data that the Conservice team is backing up regularly. The data is saved in
 multiple locations and can be made accessible when and if ESPM is no longer accessible. The
 quickest and easiest way to access the saved data is by the self-service downloading of the
 portfolio noted above.

Does Conservice's backup have all the secondary property details/meter info/entries to allow us to quickly recreate profiles in ESPM or if we use another platform (if ESPM is eliminated)?

Yes, all details have been saved in multiple locations and formats to help ensure redundancy.

