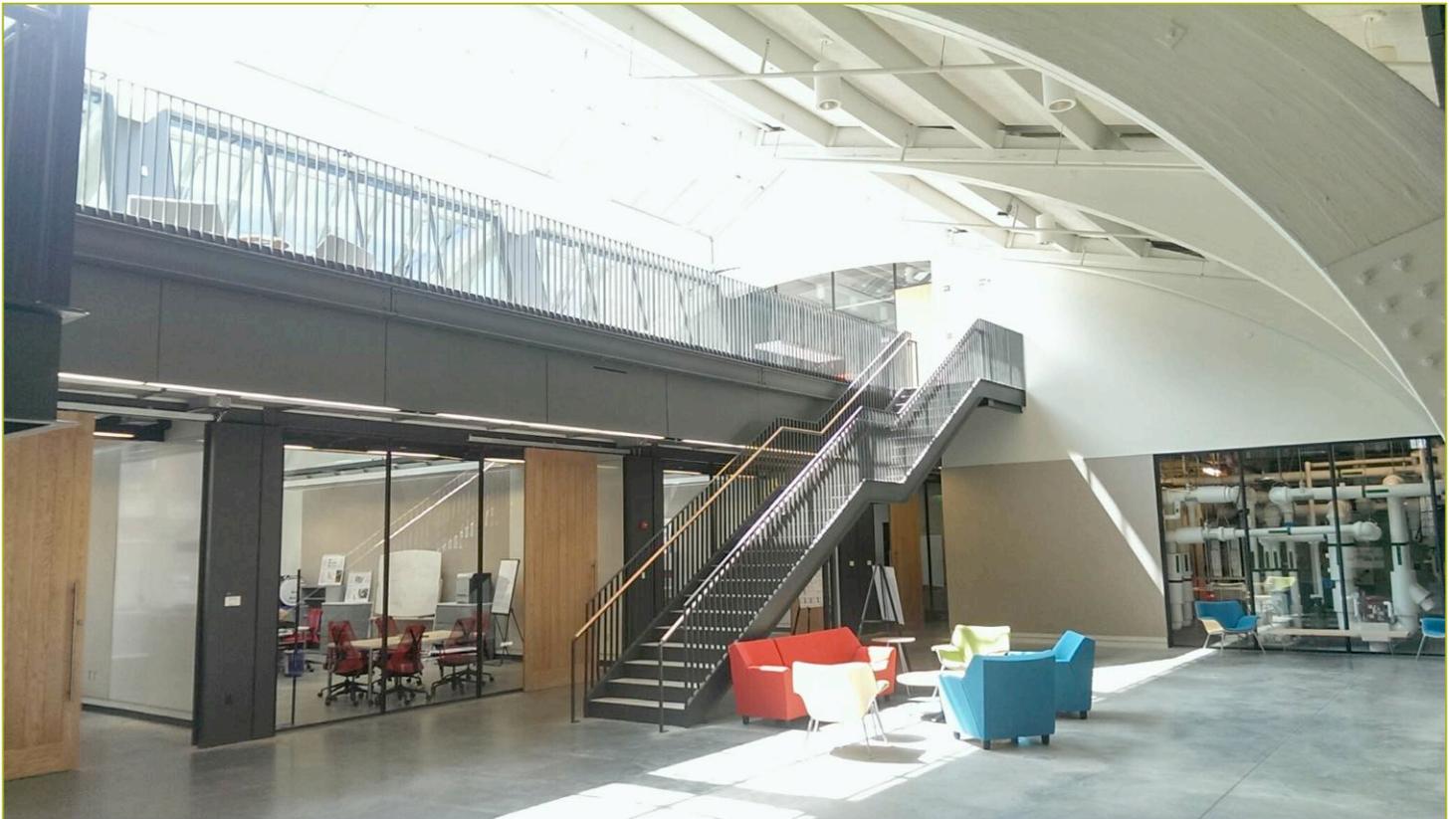


**Title: Marketing Engagement Plan for  
Certificate of Proficiency in  
Benchmarking**

**Report Date: April 29, 2016**

**Report Author: Erica Cochran-Hameen, Flore Marion,  
Sasha Kerbel, Bokyung Jun**



## Report Abstract

Project objectives.

The CBEI's marketing engagement plan for the Certificate of Proficiency in Benchmarking Program largely consisted of personal outreach and social media outreach. The personal outreach was conducted via multiple and simultaneous media methods including in person meetings, email, conference calls, and webinar meetings. Each meeting included a brief introduction of Certificate of Proficiency in Benchmarking Program and other useful online sources for the further information. For more active communication with potential stakeholders, a PowerPoint presentation and a survey were created and embedded in the email. Social Media outreach was started with creating a Facebook page for the Certificate of Proficiency in Benchmarking Program. For the extent of Social Media outreach, the existing Energy Star related webpages in each local government, public schools, and communities could be utilized as a means of Public Relations. The introduction of the Certificate of Proficiency in Benchmarking Program was requested to be posted in those pages. The key potential stakeholders included businesses, governments, communities, and individuals located in Pittsburgh, PA and the Washington DC area.

## Contact Information for lead researcher

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## Contributors

Flore Marion, Carnegie Mellon University

Sasha Kerbel, Carnegie Mellon University

Bokyung Jun, Carnegie Mellon University



The CBEI's marketing engagement plan for the Certificate of Proficiency in Benchmarking Program largely consisted of personal outreach and social media outreach.

### **Personal Outreach**

One key method for personal outreach was email. The intent of email was to reach out to potential stakeholders on a personal level, and appeal to their desire to be proactive in energy efficiency. Therefore, the email described the Certificate of Proficiency in Benchmarking Program briefly – the importance and the usefulness, and offering to meet to introduce the Certificate of Proficiency in Benchmarking Program further. The email also included important links to useful resources below:

- EPA's Energy Star webpage
- Registration page for Certificate of Proficiency in Benchmarking Program
- PowerPoint presentation to introduce the Certificate of Proficiency in Benchmarking
- Survey to collect users' feedback
- Facebook page for Certificate of Proficiency in Benchmarking Program

A PowerPoint presentation and a survey were developed by our team at CBEI team for the more active communication with potential stakeholders. A PowerPoint presentation introduces Energy Star Portfolio Manager and Energy Star Certification to convince stakeholders why people have to learn the Certificate of Proficiency in Benchmarking. This presentation also includes the instructions on the online registration and credential exam. A short survey is designed to gauge the familiarity of Energy Star Portfolio Manager and Energy Star Certification. In addition, it helps to collect users' feedback on how successful and easy to use the Certificate of Proficiency in Benchmarking Program is.

### **Social Media Outreach**

Social Media outreach has the ability to draw general audiences to the Certificate of Proficiency in Benchmarking Program to a wide array of audiences, stakeholders, and potential users. A Facebook page for the Certificate of Proficiency in Benchmarking Program was created. There has been regularly posted articles related to energy efficiency that would be of interested to the



general public, aiming to use a familiar and friendly tone. The examples of best practice on managing projects with Energy Star Portfolio Manager were also introduced to show the real benefits. This Facebook link was embedded in the email which was sent to potential stakeholders.

Other solution for the extent of outreach plan was the effective use of existing Energy Star related webpages as a means of PR. There are already existing webpages regarding Energy Star and Energy Star Certification in each local governments, public schools, communities, and so on. The introduction of the Certificate of Proficiency in Benchmarking Program was requested to be posted in those pages. This concludes the extent of our outreach plan.

### **Contact Potential Stakeholders**

The stakeholders included businesses and individuals within our network that we could reach out to on a personal level and introduce the Certificate program.

- Architects, Developers, and Contractors
- Federal Agencies
- Local Governments and Schools
- Better Building Corporate Alliance Partners
- Energy star Partners
- Architecture Department in Universities includes Carnegie Mellon University



## Weekly schedule and progress

<b>Week 1</b>	Feb 22 - Feb 28	<b>Research for Market Engagement Plan</b>	<ul style="list-style-type: none"><li>- Review Energy Star Portfolio Manager tool and online learning resources</li><li>- Suggest Improvement of Energy Star Portfolio Manager and online learning resources</li><li>- Draft stakeholder presentation and market engagement plan</li><li>- Make a contact list of potential stakeholders/partners for outreach</li></ul>
<b>Week 2</b>	Feb 29 - Mar 6	<b>Develop Market Engagement Plan</b>	<ul style="list-style-type: none"><li>- Presentation to CBPD team</li><li>- Prepare separate presentations for group are/aren't familiar with Energy Star Portfolio Manager</li><li>- Plan a schedule for On/Off-line outreach</li><li>- Draft brochure/campaign contents for email and social media network</li><li>- Add more contact list of potential stakeholders/partners for outreach</li></ul>
<b>Week 3</b>	Mar 7 - Mar 13	<b>Contact Stakeholders/partners and Set up Social Network Accounts</b>	<ul style="list-style-type: none"><li>- Presentation to CMU students</li><li>- Contact local potential stakeholders/partners, aim to set up meetings:<ul style="list-style-type: none"><li>o Pittsburgh Council City District 1-9 (<a href="http://pittsburghpa.gov/council/contacts">http://pittsburghpa.gov/council/contacts</a>)</li><li>o Pittsburgh Office of Sustainability: (<a href="http://pittsburghpa.gov/innovation-performance/leadership">http://pittsburghpa.gov/innovation-performance/leadership</a>)</li><li>o Univeristy of Pittsburgh Center for Energy<ul style="list-style-type: none"><li>▪ Danielle Ilchuck: 412.624.7476</li></ul></li><li>o EnergyStar Partner list of Governments, Schools, Businesses aimed at improving energy efficiency<ul style="list-style-type: none"><li>▪ Mercy Hospital of Pittsburgh</li><li>▪ Giant Eagle Incorporated</li><li>▪ Heinz North America</li><li>▪ PPG Industries, Inc</li><li>▪ University of Pittsburgh Medical Center</li><li>▪ Northgate School District</li></ul></li></ul></li></ul>



- Mt. Lebanon Baptist Church
- Mt. Lebanon Baptist Church
- Set up Facebook and Twitter accounts for Energy Star Portfolio Manager
- Develop Brochure/Campaign contents for Email and Social Media Network
- Draft a short survey to collect feedback

<b>Week 4</b>	<b>Mar 14 – Mar 20</b>	<b>Continue to Contact Stakeholders/partners and Post Contents on Social Media Network</b>
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- Hold meetings with potential stakeholders/partners
- Contact potential corporate partners (locally accessible)
  - Carnegie Mellon Potential Stakeholders:
    - Department of Architecture Professors:
      - Omer Akin (Head of Dept.)
      - Mary-Lou Arscott (Associate Head)
      - Donald Carter: Remaking Cities Institute Director
      - Jeremy Ficca (director of dFAB)
      - Erica Harp (Social Media Coordinator)
    - Better Buildings Partners:
      - Chipotle
      - Best Buy
      - Dunkin Brands
      - Kohls
      - Macy's
      - Wendy's
      - Walgreens
- Post on social media accounts
- Find contacts for official Facebook and Twitter pages to post about Energy Star Portfolio Manager:
  - DOE
  - EPA
  - EnergyStar
- Analyze results from short survey

<b>Week 5</b>	<b>Mar 21 - Mar 27</b>	<b>Continue to hold meetings and presentation, Update Social Media Network</b>
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- Hold meetings with potential stakeholders/partners
  - Pittsburgh Certified Green Buildings
    - David L. Lawrence Convention Center
    - PNC Firstside Center
    - Children's Museum of Pittsburgh



- Point Park University Dance Complex
- Phipps Conservatory Welcome Center
- Senator John Heinz History Center
- WYEP Radio Station
- Greater Pittsburgh Food Bank
- Carnegie Mellon University Stever House
- Pittsburgh Glass Center
- Continue to contact stakeholders/partners
  - Schupp Companies, Vienna VA
  - RVA, Falls Church VA
  - PNQK, Los Angeles CA
  - Mirae Asset Global, Los Angeles CA
  - Sintes, Silver Spring, MD
- Post updated contents on social media accounts
- Conduct a short survey at meeting, via follow up email and social media network

<b>Week 6</b>	<b>Mar 28 - Apr 3</b>	<b>Continue Stakeholders Outreach and Collect Feedback</b>
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- Continue to hold meetings with potential stakeholders/partners
- Continue to contact stakeholders/partners
  - HOK, Washington DC
  - RTKL, Washington DC
  - Leo A Daly, Washington DC
  - IDR Architect, Korea
  - Weber Rector Commercial Real Estate, Manassas VA
- Contact Federal Agencies and Contractors
  - FAA
  - State Department
  - Department of Veterans Affairs
  - Lockheed Martin
- Continue to post updated contents on social media accounts
- Continue to conduct a short survey and collect feedbacks
- Suggest to include a short survey at the end of online course and credential exam to collect feedback

<b>Week 7</b>	<b>Apr 4 - Apr 10</b>	<b>Continue Stakeholders Outreach and Collect Feedback</b>
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- Continue to hold meetings with potential stakeholders/partners
- Continue to contact stakeholders/partners
  - N.E.E.D, New York NY
  - Circumpacificus, New York NY



- River, New York NY
- Juhyun Architect, New York NY
- Architect, San Francisco CA
- ECARDI, Shanghai China
- Contact Institutions
  - Georgetown University, Washington DC
  - George Mason University, Fairfax VA
  - Inha University, Korea
  - Seoul National University, Korea
- Contact CMU Alumni, Students, and Professors
  - Kristine Fallon Associates, Chicago IL
  - KAIST, Korea
  - Hongik University, Korea
- Continue to post updated contents on social media accounts
- Continue to conduct a short survey and collect feedbacks

<b>Week 8</b>	<b>Apr 11 - Apr 17</b>	<b>Continue Stakeholders Outreach and Collect Feedback</b>
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- Find out the energy star related web pages in each county's web site, and ask to post about Certificate of Proficiency in Benchmarking program
  - Arlington County
  - Fairfax County
- Continue to contact stakeholders/partners
  - Passive House Western PA group
  - Haos, Korea
  - MCM group, Korea
  - WDG Architecture, Washington DC
  - Peabody Architecture, Alexandria VA
  - Praxis3, Atlanta GA
- Continue to post updated contents on social media accounts
  - Facebook posts
  - Create Twitter account to get attention from DOE, EPA, and official EnergyStar accounts
- Continue to conduct a short survey and collect feedback

<b>Week 9</b>	<b>Apr 18 - Apr 24</b>	<b>Analyze feedbacks and comments</b>
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- Find out the energy star related web pages in each county's web site, and ask to post about Certificate of Proficiency in Benchmarking program
  - Arlington County Public Schools
  - Fairfax County Public Schools



- Continue to contact stakeholders/partners
  - Knoll Construction, Atlanta GA
  - SBA, Washington DC
  - Thoughtful Balance, Pittsburgh PA
  - Studio St. Germain, Pittsburgh PA
  - James Construction, Pittsburgh PA
  - Eco Craft, Pittsburgh PA
  - Avon Architects, Pittsburgh PA
  - NK Architecture, Pittsburgh PA
  - Squirrel Hill Passive House Duplex, Pittsburgh PA
  - Los Angeles Water and Power Department, CA
- Continue to post updated contents on social media accounts
  - Facebook posts
  - Create Twitter account to get attention from DOE, EPA, and official EnergyStar accounts
- Collect and analyze all feedbacks and comments from stakeholders
- Draft the result of Market Engagement Plan
- Email out updates on progress of engagement plan

**Week 10**

Apr 25 - Apr 30

**Suggest Future Market Engagement Plan**

- Continue follow ups with any contacts
- Finalize the outcome of Market Engagement Plan
- Suggest the Future Market Engagement Plan



## Appendix

- Email

Greetings,

The Consortium for Building Energy Innovation (CBEI) developed an online Certificate of Proficiency in Benchmarking, a training program for the Environmental Protection Agency's [Energy Star Portfolio Manager](#).

This training program provides a tutorial on how to navigate and use Energy Star Portfolio Manager, the number one tool used by municipalities and building owners to benchmark their building energy use. This online training program is approved by the Department of Energy.

The program consists of a tutorial available for free. It takes 4 hours and can be accomplished at any pace. If the participants wish to get credentials, they can enroll and take a quiz that covers what was explained in the videos. If successful, they will be awarded a certificate of proficiency in Benchmarking.

The online program can be found at this link - [Certificate of Proficiency in Benchmarking program](#).

If you are interested in learning more about this online training program and bring it to your organization, we would appreciate the opportunity to meet with you and discuss the training program and its benefits.

Sincerely,

Sasha Kerbel ([akerbel@andrew.cmu.edu](mailto:akerbel@andrew.cmu.edu))

Bo Jun ([bokyungj@andrew.cmu.edu](mailto:bokyungj@andrew.cmu.edu))

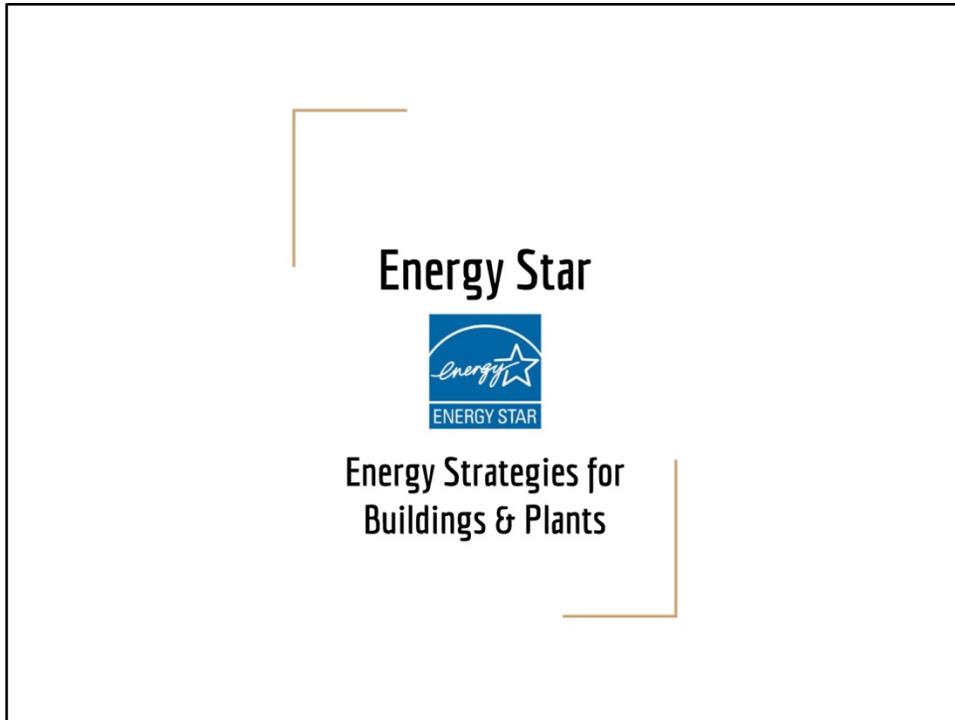
Center for Building Performance and Diagnostics  
Carnegie Mellon University



- [Learn about Energy Star Portfolio Manager and Energy Star Certification](#)
- [Register for the Certificate of Proficiency in Benchmarking program](#)
- [Explore Energy Star Portfolio Manager webpage](#)
- [Share your feedback - Survey](#)



- PowerPoint Presentation



**ENERGY STAR is about more than products.**

A screenshot of the Energy Star website. At the top, there is a navigation bar with the Energy Star logo, the tagline 'The simple choice for energy efficiency.', and several navigation tabs: 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. The 'ENERGY STRATEGIES FOR buildings & plants' tab is highlighted with a dashed circle. Below the navigation bar, there is a featured article titled 'ENERGY STAR Certified Plants Accrue Big Savings' with a sub-headline 'In 2016, 70 new ENERGY STAR certified manufacturing plants saved \$476 million in energy bills.' and a 'READ MORE' button. To the right of the article is a blue box with the EPA logo and text about the program. Below that is an orange box titled 'ENERGY STAR RESULTS' with a small chart and text about energy savings and emissions reduction.

Since **1992**, EPA has also worked with organizations to help them save money and reduce greenhouse gas emissions by making their **buildings and plants** more energy efficient.<sup>1)</sup>



## What is the Energy Star Portfolio Manager?

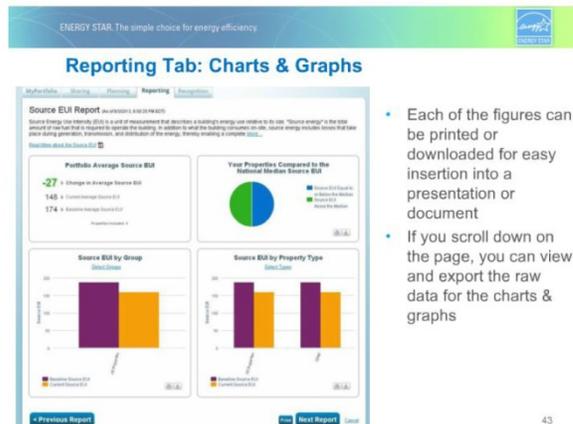


“An online tool you can use to **measure and track energy and water consumption, as well as greenhouse gas emissions.**”

- Benchmark the energy performance of your buildings in a secure online environment
- Evaluate and improve your energy use thanks to easily aggregated data

## Energy Star Portfolio Manager in Action

- Input 1 : Address, Building Use, Gross Area, Occupancy, Operating Hours
- Input 2: Energy & Water Bill
- View Aggregated Data: Source EUI, Energy Star Score

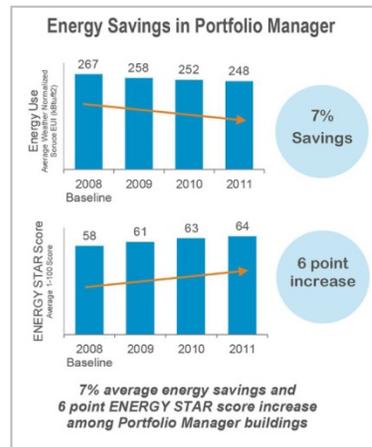


- Each of the figures can be printed or downloaded for easy insertion into a presentation or document
- If you scroll down on the page, you can view and export the raw data for the charts & graphs



## How the Portfolio Manager Helps You Save

- Manage energy and water consumption for any building
- Get a 1 – 100 **ENERGY STAR score** for eligible buildings
- Measure your carbon footprint
- Set investment priorities
- **Verify and track savings**
- Share and report performance
- Get recognition



## What does your ENERGY STAR score mean?

- A score of 50 is the median  
Below 50 means it's performing worse than 50 percent of similar buildings nationwide
- a score of **75 or higher** may be eligible for **ENERGY STAR certification**
- **ENERGY STAR certification** is renewed annually and it helps asset value increased with no cost.



## Energy Star Certification is like an Annual Checkup for Buildings



	Human	Building
<b>Examiner</b>	Doctor	PE or Architect
<b>Measure</b>	Height Weight	Gross Area Energy & Water Use
<b>Result</b>	Body Mass Index (BMI)	Energy Use Intensity (EUI) GHG Emission
<b>Purpose</b>	to measure overweight and obesity	to benchmark the performance of building

## Online Training Resources

for  
Energy Star  
Portfolio  
Manager



## What is the Certificate of Proficiency in Benchmarking

### CERTIFICATE OF PROFICIENCY IN BENCHMARKING®

- Online training program and credential exam for Energy Star Portfolio Manager tool
- Train service providers, building operators and other interested professionals how to benchmark their buildings, assure the quality of their data and measure/monitor their progress
- Free for use, after registration

## How to Register the Certificate of Proficiency in Benchmarking

- Click [Register the Certificate of Proficiency in Benchmarking program](http://online.njit.edu/cbk/) or visit <http://online.njit.edu/cbk/>
- Click 'Certificate of Proficiency in Benchmarking: Training Program'

### CERTIFICATE OF PROFICIENCY IN BENCHMARKING®

The Certificate of Proficiency in Benchmarking® is an online-based program that recognizes successful completion of training and testing in minimum competencies in the use of the U.S. Environmental Protection Agency's ENERGY STAR Portfolio Manager® tool.

Across the U.S. there is growing support for benchmarking building energy and water consumption, driven both by local legislation and voluntary interest in understanding and improving building performance. The Certificate of Proficiency in Benchmarking® offers building industry professionals the opportunity to learn how to collect energy and water use information and successfully benchmark most types of buildings.



This certification program will train service providers, building operators and other interested professionals how to benchmark their building, assure the quality of their data and measure/monitor their progress. This training program is free for use, after registration.



## How to Register the Certificate of Proficiency in Benchmarking

- Click **'Create new account'** and fill out the new account form
- A confirm email will be sent to you.

CERTIFICATE OF PROFICIENCY IN BENCHMARKING: TRAINING PROGRAM

Home | My courses | benchmarking | benchmarking

News Forum

Your progress

**Portfolio Manager 101**  
Portfolio Manager 101 is an introduction to the new portfolio manager. This lesson shows participants:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy and water consumption data
- Generate reports to assess progress

**Portfolio Manager 201**  
Portfolio Manager 201 demonstrates for participants how to use some of the more advanced features of Portfolio Manager including:

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

**Portfolio Manager 301**  
The mission of Portfolio Manager 301 is to address the current quality assurance/quality control issues. This includes:

- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reports
- Use the Sustainable Buildings Checklist

UPCOMING EVENTS  
There are no upcoming events.  
Go to calendar...  
New event...

MAIN MENU  
News Forum

NAVIGATION  
Home  
My home  
My profile  
Current course  
Benchmarking  
Participants  
My courses

SETTINGS  
Course administration  
Download me from benchmarking  
Grades  
My profile settings

## Why Invest in this Certificate?

- Become more proficient in the Energy Star Portfolio Manager
- Become more competent and knowledgeable in energy benchmarking overall
- Accurate benchmarking - accurate reflection of energy use
  - Beneficial to you, and other organizations around you



## Overview of Training Program

- 4 online tutorials
  - Introduce Energy Star Portfolio Interface
  - How to input building energy data correctly & efficiently
  - How to edit & share data
  - Walkthrough of actually entering own data

## Overview of Credential Exam Program

- Final Exam
  - To qualify, complete all 4 tutorials within the last 12 months
  - Three exam attempts available 12 month period.
  - \$125 fee for 2-year certification period
  - Complete the certificate before April 30 and CBEI will refund you!



## More Online Training Resources are available

Various learning resources: PDFs, Videos, Web Conferences

- <https://www.energystar.gov/buildings/training>

The screenshot shows the Energy Star Portfolio Manager training resources page. The header includes the Energy Star logo and navigation links for 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. The main content area is titled 'Training' and features a 'TRAINING VIDEOS' section with a video thumbnail for 'How to Set up a Property in Portfolio Manager'. Below this, there is a list of resources under the heading 'Using Portfolio Manager', including PDFs and videos for various tasks like setting up a property, adding utility data, and using spreadsheets. A 'ASK A QUESTION' button is also visible.

The future of  
Energy Star  
Portfolio  
Manager



# Measuring & Tracking Energy in Real time



Residential Business Corporate Location: Virginia Contact Us Sign Up/Register

**Dominion** | Dominion Virginia Power

Customer Service Change Center Safety Ways to Save In the Community News

Dominion Virginia Power > Customer Service > Smart Meters > Detailed Energy Usage

### Detailed Energy Usage

Customer Service

- Manage Account
- Manage Service
- Billing Options
- Payment Options
- Rates and Regulation
- Smart Meters
- Detailed Energy Usage
- Smart Meter FAQs
- Smart Meter Locations

SEE YOUR DETAILED ENERGY USAGE

Customers who have a smart meter are able to see how much energy they are consuming by month, day, and 30-minute intervals. Log into Manage Your Account to automatically see your monthly and daily information which will help you make informed energy choices throughout the month.

Customers can email to view and download 30-minute interval usage data. Email in this **NEW** option and send us your feedback all within Manage Your Account.



Smart Meters 6)

# Develop User Friendly Reports

the auto-generated report in Energy Star Portfolio Manager

vs

the re-generated report by one of energy consulting company<sup>9)</sup>

### Summary Report

NOT FOR USE WHEN APPLYING FOR THE ENERGY STAR

**Statement of Energy Performance FACILITY SUMMARY REPORT**  
Sample Facility  
For 12 Month Period Ending: February 28, 2007  
Date Generated: May 11, 2007

This document was generated using EPA's Portfolio Manager system. All information shown is based on data provided by the building's metering and control system, recorded on the date of the report generation. Careful review of metering and control system data is recommended to verify that the underlying data is accurate. Smart Space has been set intentionally on the "Off" position.

Year: 2006  
Report Year: 2006  
Report Period: 2006-01-01 to 2006-12-31

**Facility Space Use Summary**

Building Area (sq ft)	Number of Occupants	Maximum Number of Occupants	Address
100,000	100	100	1

**Energy Performance Comparison**

Category	Score	Target	Industry Average	ENERGY STAR
Energy Performance Index	100	100	80	75
Energy Intensity (kBtu/sq ft)	12.50	12.50	13.84	147.74
Electricity	3.84	3.84	41.30	47.84
Gas	8.66	8.66	9.54	9.90

### Energy Usage Report

2 WFC 223 Liberty Street, New York, NY 10038

Owner: Building Owner  
Year Built: 1987  
Report Period: 12/1/2006 - 12/31/2007

**Your Building's Score**  
94  
Average Score For Your District: 64

**Your Carbon Footprint**  
27,109,373 lbs/year

**Annual Site Energy Consumption**

How You Compare to Your District: Your Building is 20% better than the district average.

**Annual Carbon Emissions**

How You Compare to Your District: Your Building is 20% better than the district average.

