IREM®
INSTITUTE OF REAL ESTATE MANAGEMENT

Be sure to define the level of property management control. This will be taken into consideration for IREM's evaluation of Step 3: Planning as well as progress on that planning at recertification.

Energy assessment part 1: Basic info

This energy assessment can be used to meet the IREM CSP v.2025 B.4 Part 2 baseline requirement. This assessment is not required if the property (1) has had an ASHRAE Level 1 or Level 2 audit performed in the same calendar year as the year in which the IREM CSP application is submitted or (2) is no more than five years old and certified under a initial construction green building certification, such as LEED BD+C or BREEAM New Construction.

Person conducting assessment:	Jane Doe
Date:	6/12/2025
Signature:	*Jane Doe*

Complete the following information.

Property name:	Grove at River Bend
Address:	123 Main St., Pittsburgh, PA 15213
Property type:	☐ Storage ☐ Senior ☐ MOB ☐ Office ☐ Closed retail ☐ Open air retail ☐ Industrial/ warehouse ☑ MF
Year built:	

General description of the site and property (2-3 sentences):

300-unit garden-style multifamily community built in 1996 in urban area with limited exteriors. The property has undergone several efficiency upgrades but more is possible through capital projects.

Who maintains the lighting at the property?

- ☐ Property management
- ☐ Tenants
- ☐ Property management controls common areas/outdoors, tenants control lighting in tenant spaces
- ☑ Other (describe) — Property management controls common areas/outdoors and maintains/replaces lighting in units but resients control usage.

Who maintains the HVAC equipment at the property?

- ☐ Property management
- ☐ Tenants
- ☐ Property management controls base building equipment, some tenants have their own equipment
- ☑ Other (describe) — Property management controls common areas/outdoors and maintains/replaces lighting in units but resients control usage.

Describe any recent or planned major retrofits (2-3 sentences):

LED retrofits - parking lot is the primary opportutnity here, with some building lighting.

Review the energy utility data. Compare the Site energy use intensity EUI (kWh/ft²/yr) for each energy source with similar properties in the portfolio or within ENERGY STAR® Portfolio Manager®. Describe your observations below.

- ☐ Property is on the lower end of the EUI range for this property type, with good energy performance
- ☑ Property is in the middle of the EUI range for this property type, with average energy performance
- ☐ Property is on the high end of the EUI range for this property type, with poor energy performance
- ☐ Other (describe)

To determine the site EUI range, contact whoever manages the property's ENERGY STAR Portfolio Manager account. Portfolio Manager will show how the EUI compares to the national median.

Completed measures from past 4 years (capital or operational)

Completed measure	Date implemented
LED retrofit of interior common areas and units.	9/1/2022
Preventive maintenance schedule adhered to, with equipment receiving manufactured recommended service.	Ongoing

Don't forget the basics such as adhering to preventive maintenance schedules and regular property inspections. Those qualify as "completed measures."

Estimated dates will suffice if specific dates are not available.

Energy assessment step 2: Systems

Summary of existing lighting systems

Location or space type	Light type	Estimate % of SF covered	Location	High efficiency? (Y/N)	Daylight or occupancy sensors? (Y/N)	Retrofit opportunity? (Y/N)	Describe potential upgrade opportunity or flag issues for future audits
Parking lot pole lights	T8 Fluorescents	100%	Parking	N	N	Y	Upgrade to LEDs
Decorative sidewalk light poles	Other	5%	Bldg 1,2,3	N	N	N	Decorative
Rear building wall packs	MH-PS (Metal Halide Pul	5%	Bldg 1,2,3	N	N	Y	Upgrade to LEDs
Corridor lights	Halogen MR16s	5%	Bldg 1,2,3	N	N	Y	Upgrade to LEDs
Units	LED luminaires	70%	Bldg 1,2,3	Y	N	N	N/A
Leasing office	LED luminaires	10%	Main	Y	N	Y	Add occupancy sensors
Clubhouse	LED luminaires	5%	Main	Y	N	Y	Add occupancy sensors
Fitness center	LED luminaires	5%	Main	Y	Y	N	N/A

Summary of major HVAC systems

HVAC unit type	HVAC equipment type	Number of units	Location	Age, # years	High efficiency? (Y/N)	Retrofit opportunity? (Y/N)	Describe potential upgrade opportunity or flag issues for future audits
Unit air conditioner units	Air Conditioner	300	Bldg 1,2,3	Varies	Y	N	All high efficiency and with no replacements due
Lobby, leasing office air conditioner units	Air Conditioner		Main	6	Y	N	
Lobby, leasing office furnace	Other HVAC equipment		Main	4	Y	N	

Do your best to identify equipment. Engage a maintenance person for help, and focus on identifying retrofit opportunities. Complete what you can for Step 2.

Do you anticipate replacing HVAC units in the next:

☐ 1 year ☐ 3 years ☑ 5 years ☐ >5 years

Replace HVAC units with correctly sized, high efficiency options. Source multiple options, and look at energy payback compared to the like-for-like replacement.

Windows

Window description	Window type	Number of windows	Locations	Age, # years	High efficiency? (Y/N)	Retrofit opportunity? (Y/N)	Describe potential upgrade opportunity or flag issues for future audits
Windows	Single-hung	400	All	4	Y	N	ENERGY STAR - no replacements due

Do you anticipate replacing windows in the next:

☐ 1 year ☐ 3 years ☐ 5 years ☑ >5 years

Energy assessment step 3: Plan

The planned measures can be either projects previously identified or new projects found from the assessment. Plan to carry out these projects in the next three years.

Planned measures	Planned date of implementation
Complete LED retrofits - parking, rear building wall packs, corridor lights	2026
Occupancy sensors - leasing office, clubhouse	2026
Smart thermostats for common areas and units	2027

List at least three (3) planned measures. Remember that operational improvements count. IREM will evaluate progress on this plan during the recertification process.

The possible measures are ones identified but not in the near term. It is important to note them down. Energy prices, cost of technology, and utility incentives change quickly.

Longer term measures
Monitor opportunities for better energy management with emerging technology solutions.
Research energy contracting
Plan and budget for energy-efficient roofing for re-roofing in 2030.

Consider what's possible for longer term measures. These can be retrofits that will be necessary as part of normal operations, based on asset planning for the sustainability program, or aspirational in nature.