



International Facility Management Association

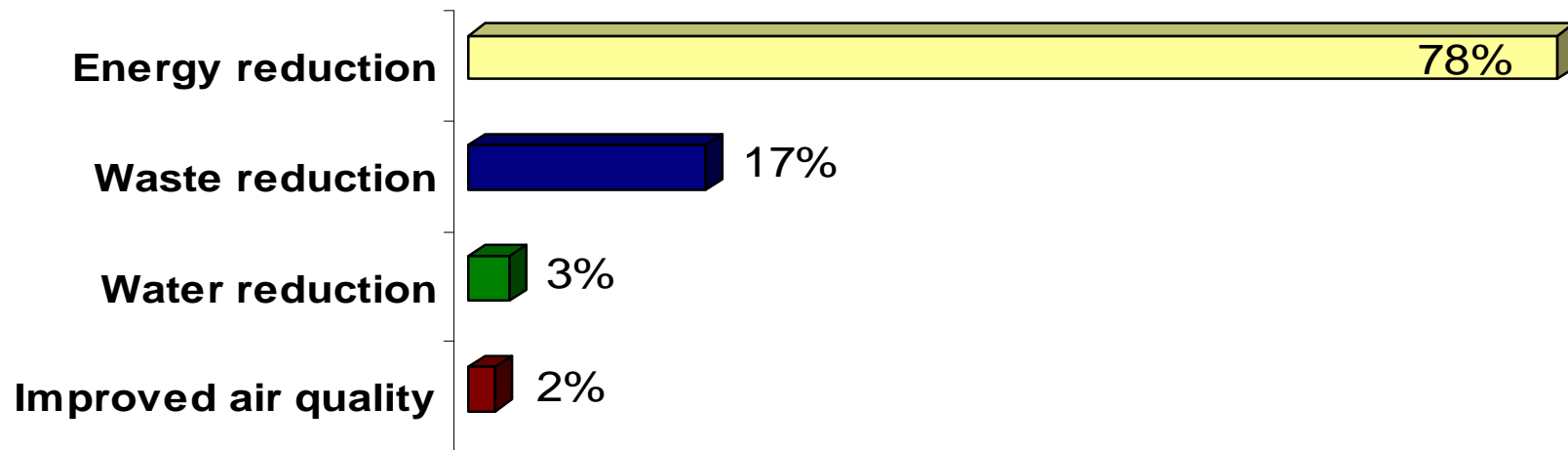


IFMA Energy Efficiency Research

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International Facility Management Association

IFMA members manage more than 37 billion square feet. Where could IFMA members make the biggest impact in improving the environment?



IFMA Trends Report

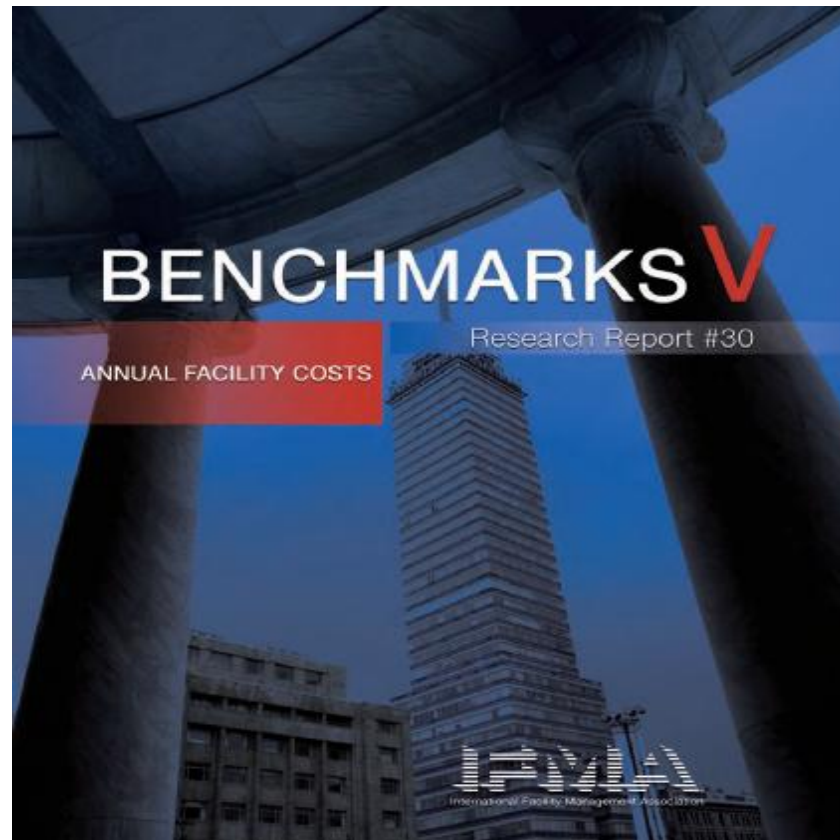


http://www.ifma.org/tools/research/forecast_rpts/2007.pdf

IFMA's Trends Report Findings

- Ø Demand is escalating for environmentally friendly high performance buildings.
- Ø Companies that are not incorporating sustainable practices will be at a competitive disadvantage.
- Ø Difficult to quantify value (ROI), show business case, although the number of built projects and case studies continues to grow.
- Ø Imperative to develop and maintain technical skills expertise, for operational expertise is critical to building performance.
- Ø Important to perform commissioning and retro-commissioning to ensure that “you’ve gotten what you’ve paid for.”

Benchmarks V Annual Facility Costs Report



Benchmarks V Findings

- Ø Data gathered in 2007 representing facility costs from 2006
- Ø Report based upon 1,032 buildings across US and Canada
- Ø Utility cost is up 19% compared to 2005
- Ø Average electricity consumption, measured in kBTUs per square foot —dropped from 93 to 81
- Ø Average gas consumption remained constant at 35 kBTUs per square foot.

Energy Efficiency Indicator 2008



http://www.ifma.org/tools/research/surveys/2008_energyeffindex.pdf

Energy Efficiency Indicator Study

- Ø Conducted March 2008
- Ø 338 facility manager respondents
- Ø Majority manage facilities greater than 500,000 square feet
- Ø 74% manage office space
- Ø 78% private sector/22% public sector

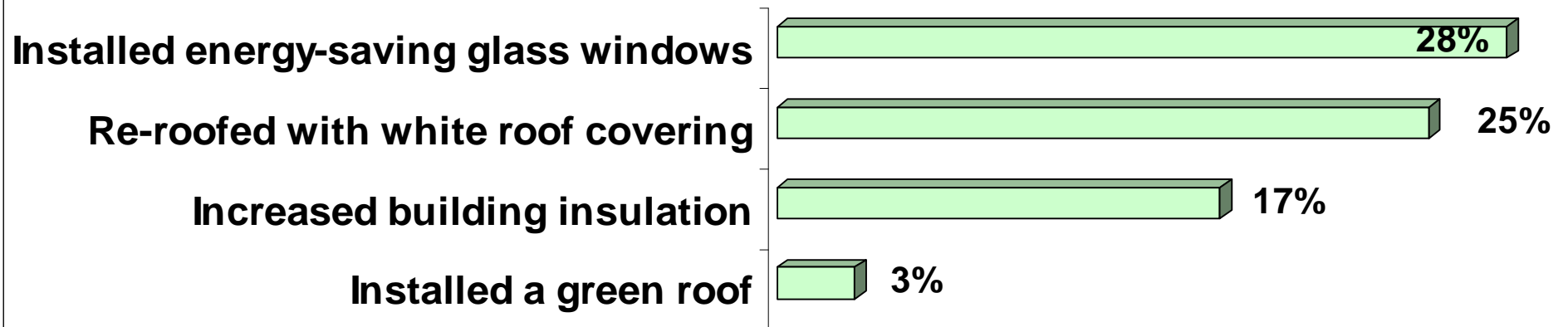
Selected Findings

- Ø 75% Expect to make energy efficiency improvements with capital funding
- Ø 40% Believe government/utility incentives influence their energy efficiency decisions
- Ø 88% Will consider energy efficiency as a priority in any future construction/retrofits
- Ø The majority will tolerate an average payback of 4 years on energy efficiency investments

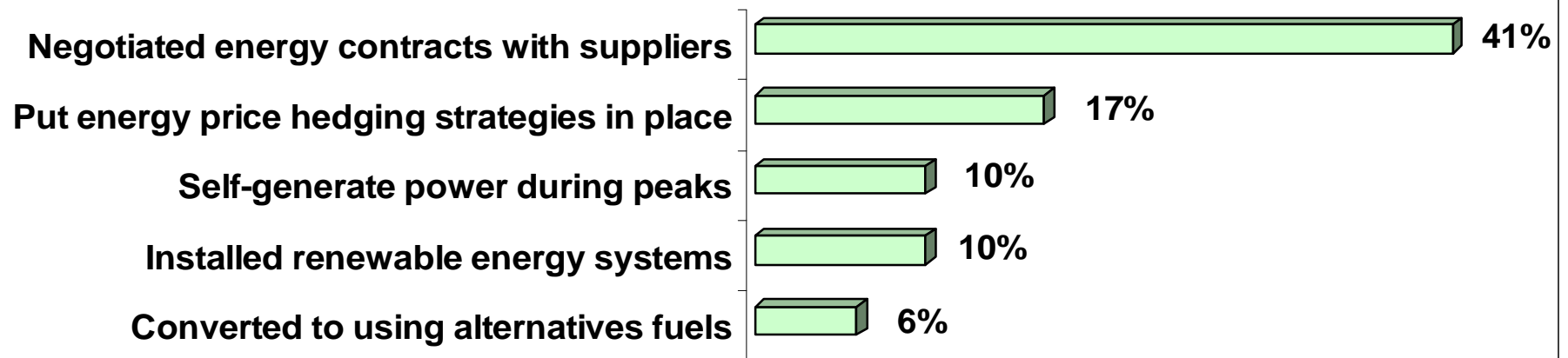
Equipment Related Measures Adopted

- Ø 75% Adjusted HVAC controls
- Ø 53% Upgraded existing building management system
- Ø 53% Installed variable speed/frequency drives
- Ø 45% Replaced inefficient equipment before the end of useful life
- Ø 27% Installed building management system where one did not exist
- Ø 12% Captured waste energy (heat, steam)

Building Design-Related Measures Adopted



Energy Supply-Related Measures Adopted



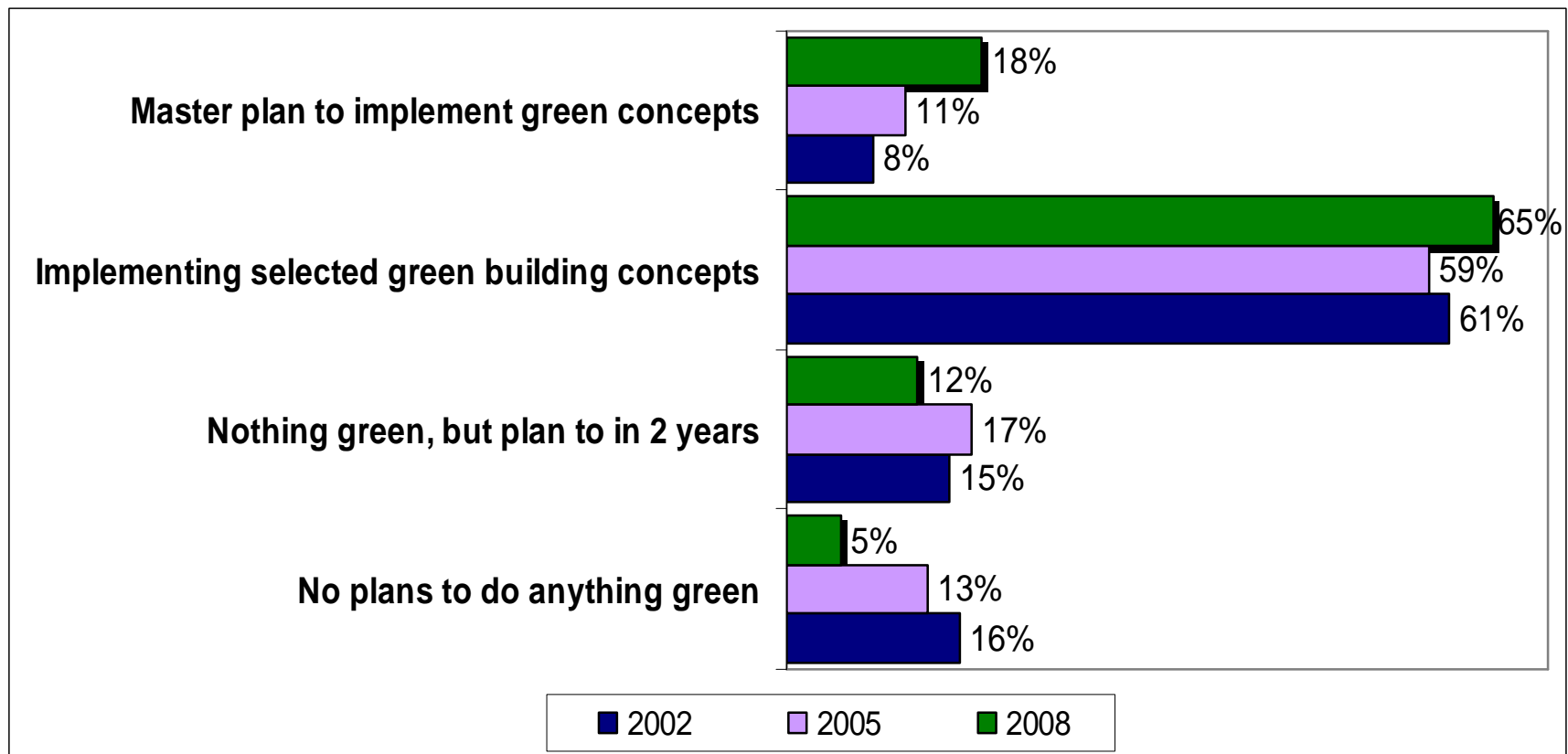
IFMA Green Practices 2008



Green Practices Study

- Ø Conducted September 2008
- Ø 500+ respondents
- Ø 42% government sector
- Ø 70% owned properties
- Ø Average age of building = 33 years

Attitude Towards Green Building Concepts



Who's Driving Sustainability

Ø Internal

§ Facility Management 88%

§ Employees 20%

§ C-Suite 16%

Ø External

§ Customers 67%

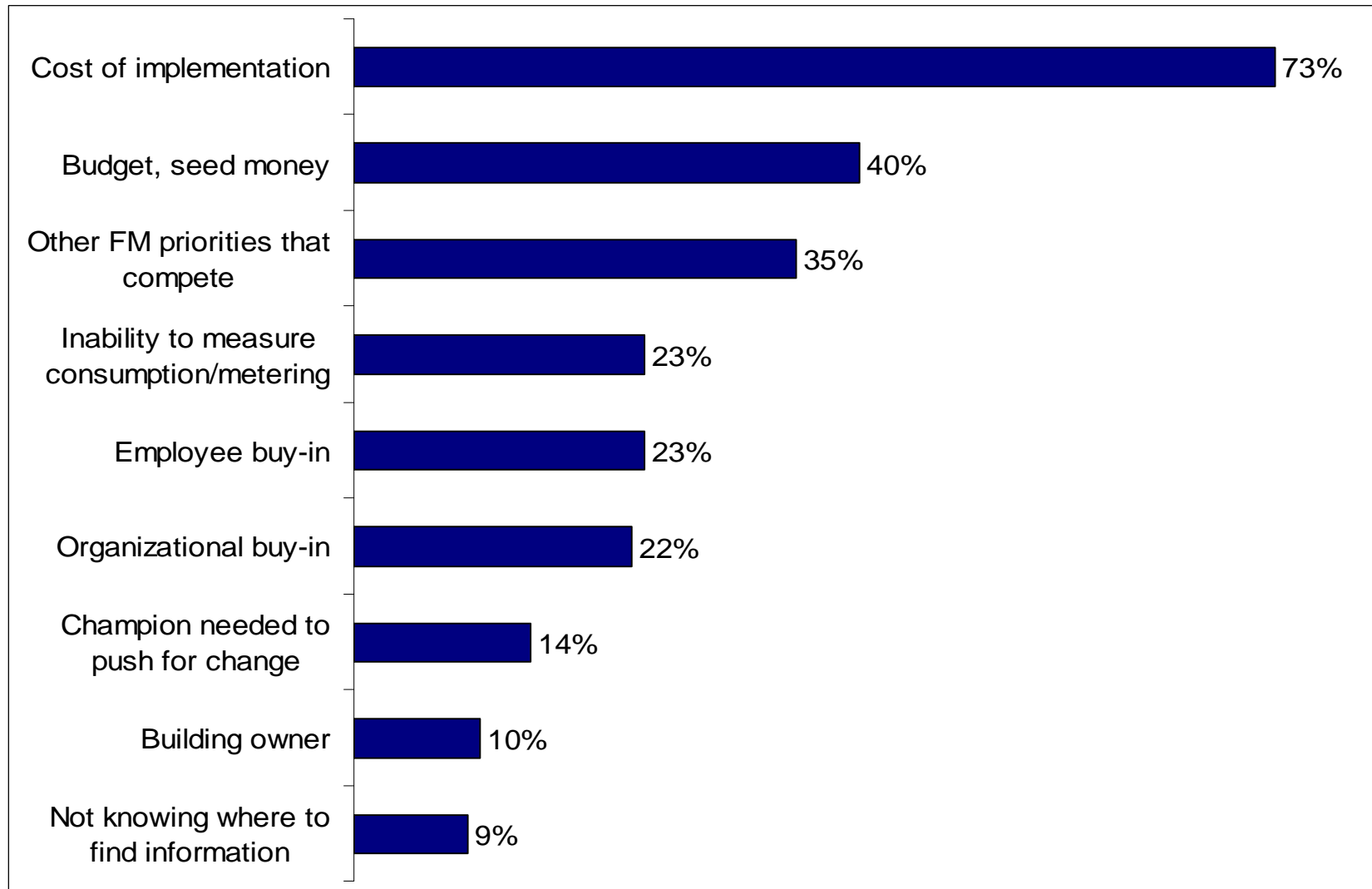
§ Government 45%

§ Grant Providers 14%

Sustainable Energy Practices

- 74% Adjusted operating hours of HVAC
- 67% Retrofitted/Upgraded lighting
- 67% Installed lighting sensors
- 65% Installed energy efficient replacements
- 63% Set back thermostat
- 35% Negotiated with energy suppliers
- 34% Increased energy consumption monitoring
- 19% Re-commissioned building systems
- 18% Installed energy-saving glass
- 13% Using alternative/renewable energy sources

Barriers to Addressing Energy Issues



Energy Star and LEED



9% Energy Star rated



23% Working toward
LEED certification

Challenges Encountered

Financial Challenges	73%
Balancing Sustainable Initiatives with FM Duties	54%
Educating Employees	46%
Obtaining Buy-In from Management	30%
Costly and Cumbersome Accreditations	20%
Limitations to What Can Be Done - Tenant	18%
Sourcing Sustainable Products	15%
Finding Knowledgeable Consultants	10%
Inability to Provide Generally Accepted Financial Indicators to C-Level	10%



Questions?

