

# HUD Multifamily Utility Benchmarking Webinar Series

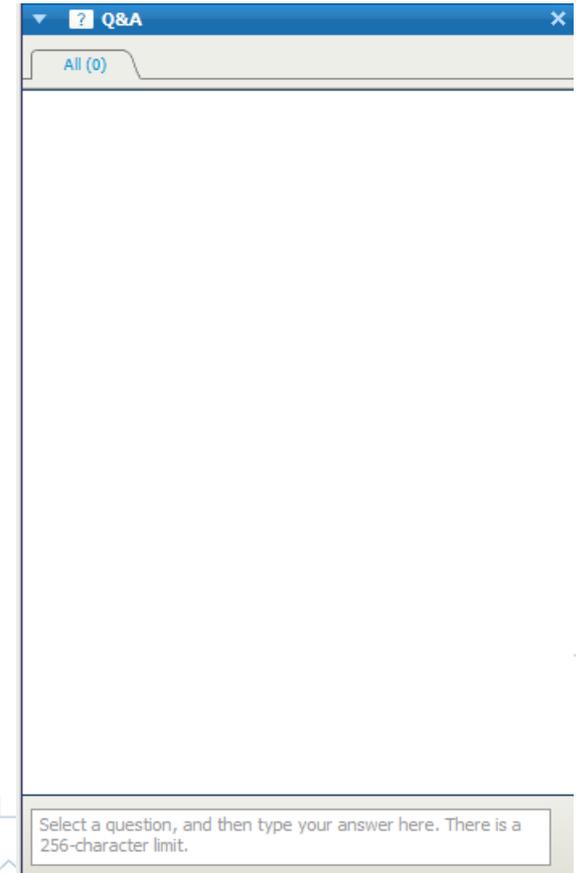
## **Webinar 3: Collecting the Data for Utility Benchmarking of Multifamily Properties**

April 27, 2017



# Webinar Logistics

- Submit content related questions via the WebEx Q&A box – submit to “All Panelists”
- Submit technical issues related to WebEx in the Chat box – submit to “Host”



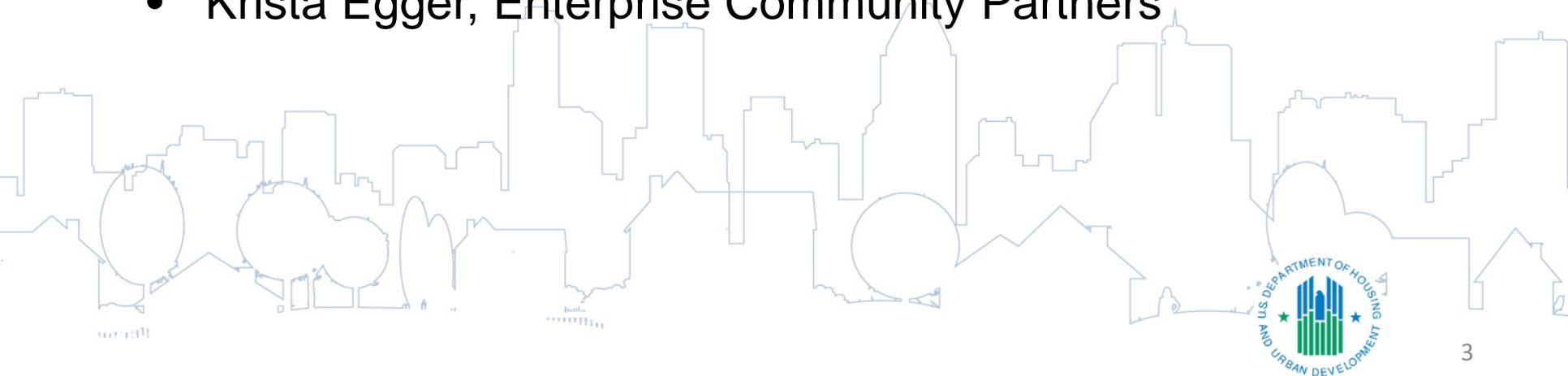
# Presenters

## Host

- Julia Hustwit, US Department of Housing and Urban Development

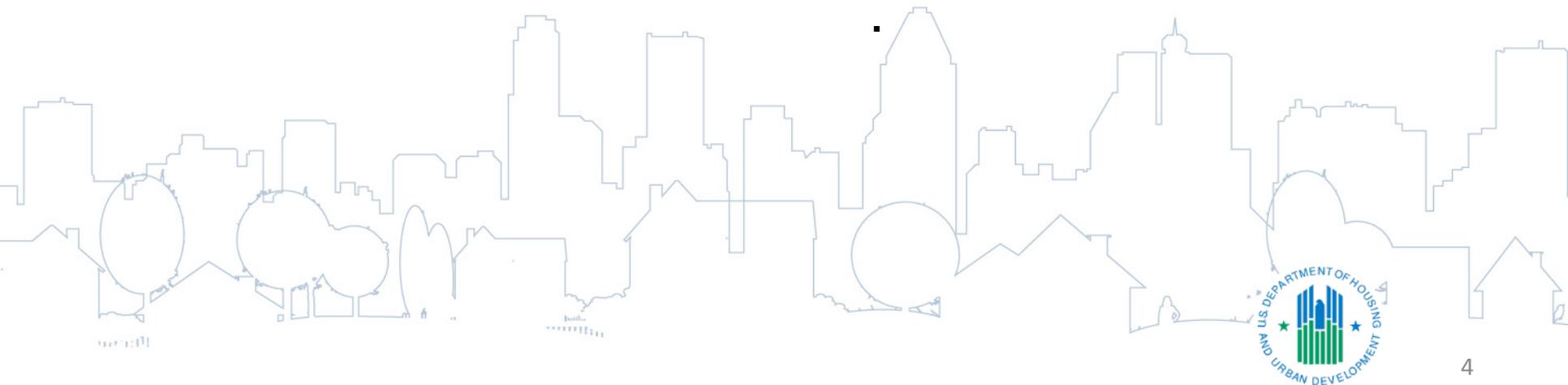
## Speakers

- Scott Ledford, ICF
- Sara Lisauskas, ICF
- Krista Egger, Enterprise Community Partners



# Today's Webinar

- Third session of a 6-part series
- Attendees are encouraged to register for and join all sessions
- Recordings will be made available
- For more information, and to register, go to “Events and Training” on the [HUD Exchange](#)

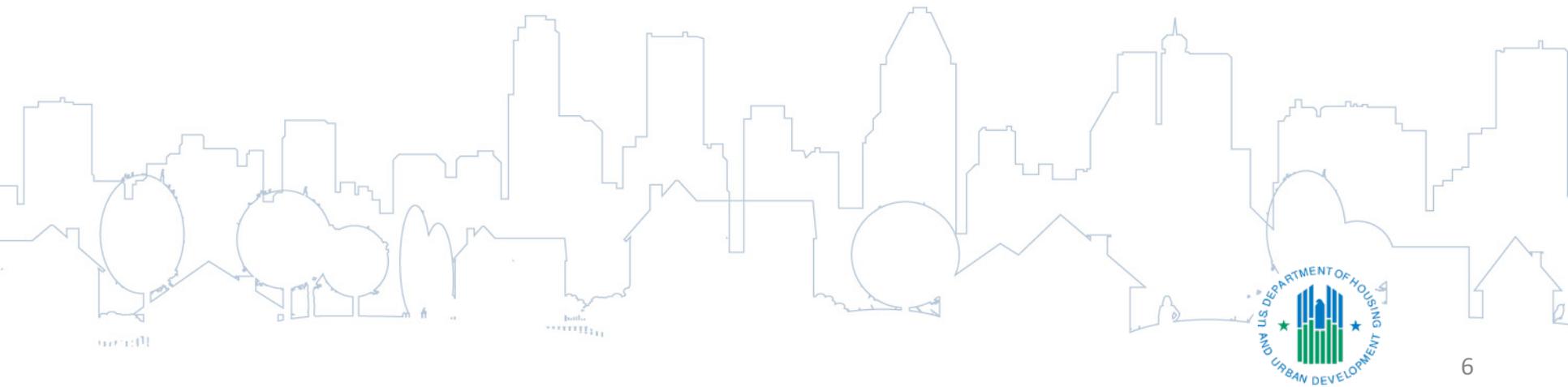


# Learning Objectives

- In this session, you will:
  - Learn about four methods for collecting the utility data needed to correctly benchmark a multifamily property;
  - Gain an understanding of resources and tips for engaging with utility providers to obtain the data needed for benchmarking;
  - Learn how to translate sampled tenant data into benchmarking inputs; and
  - Receive a demonstration of using HUD's new Tenant-Paid Utility Data Sampling Calculator, which can help estimate total tenant consumption and cost when complete data is not available.



# Overview of Data Collection for Utility Benchmarking

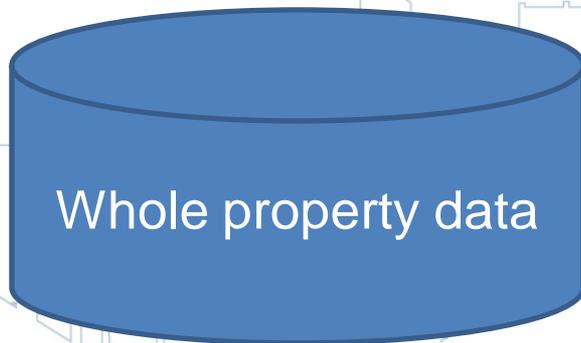
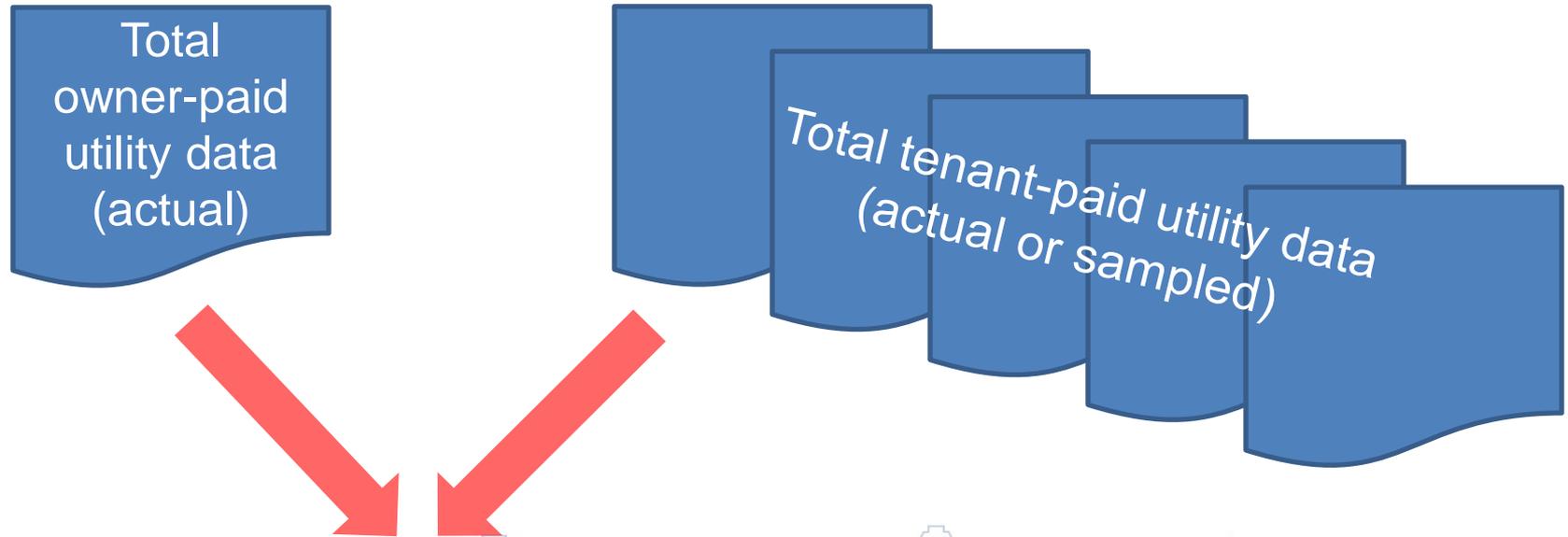


# Useful Terms and Concepts

- **Whole-Property Data**
  - Monthly data accounting for total consumption and cost across all utility types and all meters, whether paid by the property owner or the tenants
- **Aggregated Data**
  - Monthly data summed across all meters of a utility type [e.g., electric, gas, water]
  - Should be kept separate for two types of payers [owner vs. tenant(s)]
  - Easier to enter into Portfolio Manager this way
- **Sampled Data**
  - Utility data from a subset of tenant-paid accounts that is used to estimate total tenant-paid utility consumption and cost



# Whole-Property Data is the Goal!



# Four Methods for Collecting Whole-Property Data

- Method A
  - Properties with only owner-paid utility accounts
- Method B
  - Aggregated, whole-property utility data
- Method C
  - Collection of 100% of tenant-paid utility data
- Method D
  - Collection of a sample of tenant-paid utility data

*Note: these methods are not mutually exclusive. Different methods may be needed to collect data for different utility types at a single property*



# Method A

- Property owner pays for 100% of utility bills (representing all common space + all tenant space)
- a.k.a. “master metered”
- Should be able to collect all necessary utility data off of owner’s utility invoices
- Simplest scenario
- Data suggests this could be the case for:
  - 36% of Office of Multifamily Housing’s assisted housing stock; and
  - 46% of Office of Public Housing’s public housing stock



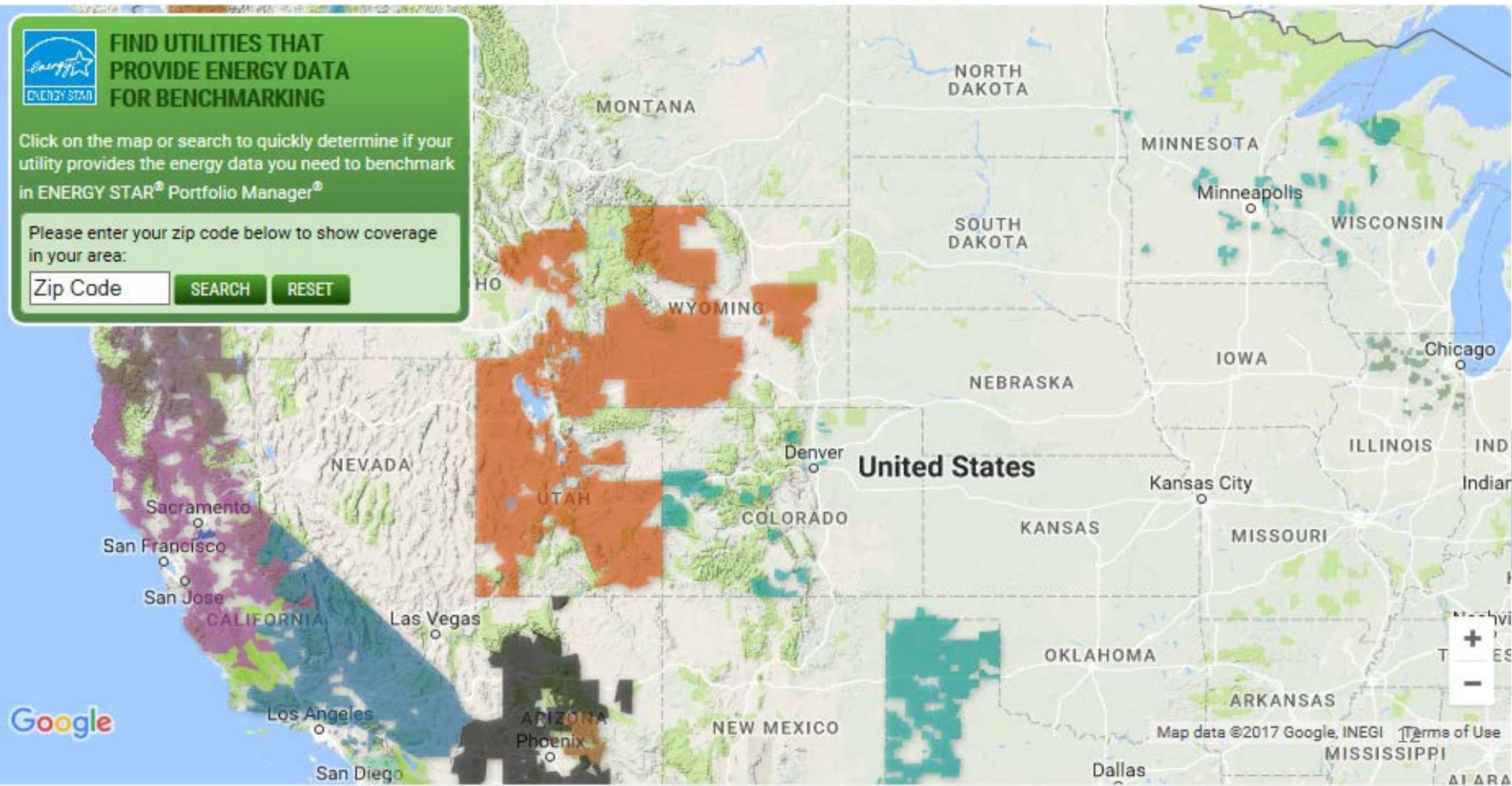
# Method B

- Property owner requests and receives aggregated, whole-property utility data from utility provider(s)
  - Typically consists of monthly figures representing all utility consumption and costs for a given utility type (whether owner- or tenant-paid)
- Increasing number of utility providers across the country are providing this service
  - Many also provide automated transfer of aggregated utility consumption data into Portfolio Manager
- ENERGY STAR maintains a map and list to help you determine if your utility provider offers this service
- HUD continues to expand the [Multifamily Utility Data Collection Database](#)



# Method B (cont'd.)

[www.energystar.gov/utilitydata](http://www.energystar.gov/utilitydata)



# Method B (cont'd.)

[www.hudexchange.info/programs/utility-benchmarking/utility-data-collection-database/](http://www.hudexchange.info/programs/utility-benchmarking/utility-data-collection-database/)

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Home > Programs > Utility Benchmarking > Multifamily Utility Data Collection Database

## Multifamily Utility Data Collection Database

Utility benchmarking can be challenging in multifamily properties with tenant-paid utility accounts, because each utility provider requires property owners to follow a different procedure for requesting tenant-paid utility data.

To make things easier, HUD is incrementally cataloging utility providers' procedures for requesting tenant-paid utility data, whole-property data, and automatic data transfer. It contains the following information:

- **Database:** Documents the process for requesting utility data from many of the major utility providers in the United States, and the format(s) in which these utility providers share data
- **Rubric:** Shows a scoring rubric used to develop a user-friendliness score for each utility provider
- **Regional Benchmarking Mandates:** Outlines many of the local utility benchmarking laws that apply to multifamily properties

[Download the Multifamily Utility Data Collection Database \(XLSX\)](#)

### Utility Profiles

Select the state where a utility operates to view a profile describing the utility's procedures to release tenant-level and whole building energy use and cost data.

<a href="#">Alabama</a>	<a href="#">Idaho</a>	<a href="#">Montana</a>	<a href="#">Puerto Rico (N/A)</a>
<a href="#">Alaska (N/A)</a>	<a href="#">Illinois</a>	<a href="#">Nebraska</a>	<a href="#">Rhode Island</a>
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<a href="#">Arizona</a>	<a href="#">Iowa</a>	<a href="#">New Hampshire</a>	<a href="#">South Dakota</a>
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<a href="#">Florida</a>	<a href="#">Michigan</a>	<a href="#">Ohio</a>	<a href="#">Washington</a>
<a href="#">Georgia</a>	<a href="#">Minnesota</a>	<a href="#">Oklahoma</a>	<a href="#">West Virginia</a>

# Method B (cont'd.)

- Instructions on how to request aggregated whole-property data vary by utility provider – so be sure to check!
- If possible, request that the utility provider separately aggregate owner-paid data and tenant-paid data
  - Easier, but may not always be available
  - Can instead subtract out known owner-paid portions to maintain separately from tenant-paid portions
- For properties consisting of multiple buildings, be sure to specify whether you are requesting aggregated data at the level of the full property or the individual building

# Method C

- The property owner collects 100% of the individual tenant-paid utility data
- Typically, the owner will ask tenants to fill out utility data release forms
  - Once received and on file, the utility provider can send tenant utility data directly to the property owner
  - Ongoing data release can be authorized, allowing the owner to obtain new data each month/year without going back to the tenants
- Total tenant-paid consumption data can then be maintained alongside owner-paid utility data to achieve whole-property data



# Method C (cont'd.)

- Most utility providers will have their own data release authorization forms, as well as preferences for how property owners submit data requests
- These are being tracked and documented in HUD's [Multifamily Utility Data Collection Database](#)
- Examples of authorization forms and additional guidance on how to request data are also provided in HUD's [Multifamily Utility Benchmarking Toolkit](#)



# Method D

- Property owner collects a sample of individual tenant-paid utility data (rather than 100% of tenants), and uses this to estimate total tenant-paid utility consumption and cost at the property
- This method is acceptable for some HUD programs, refer to the program requirements specific to each property
  - If more than one set of program requirements apply to a property, meet the most stringent
- Best practice for utility benchmarking is to use 100% actual utility data; endeavor to use larger samples or complete data when possible to improve insights
- In such cases, “whole-property data” = complete owner-paid data + estimate of total tenant-paid data (based on extrapolation of sampling results)

# Method D (cont'd.)

- Property owners will still need to obtain data from individual tenants – either directly, or via utility authorization forms (same as Method C)
- However, data will only need to be collected from some, rather than all, tenants
- HUD provides detailed sampling guidance addressing how many tenant units must be included, based on:
  - Total property size
  - Breakdown of unit types (# BRs, affordable vs. market-rate)
  - Applicable program requirements
- Method D is not generally accepted by local laws or for ENERGY STAR Certification



# Sampling Protocols

## Summary of Sampling Protocols

	<b>Tier 1 Data Sampling</b>	<b>Tier 2 Data Sampling</b>	<b>Tier 3 Complete Data</b>
<b>Originally Developed for</b>	Better Buildings Challenge Annual Data Displays	Assisted Housing Utility Allowance Calculations	N/A
<b>Best Used for</b>	<ul style="list-style-type: none"> <li>Gaining basic insight into building performance</li> <li>Creating an annual data display as a Better Buildings Challenge Partner</li> </ul>	<ul style="list-style-type: none"> <li>Gaining additional confidence about utility consumption and costs in order to make basic financial estimates</li> <li>Complying with HUD's utility allowance schedule development requirements within Assisted Housing</li> </ul>	<ul style="list-style-type: none"> <li>Gaining the highest confidence about utility consumption and costs in order to make specific financial decisions</li> <li>Applying for Energy Star Certification</li> <li>Complying with most local utility benchmarking laws</li> </ul>
<b>Full Details Provided at</b>	<a href="#">Appendix C of the Better Buildings Challenge Data Manual</a>	<a href="#">Part VI of HUD Notice H-2015-04</a>	N/A

# Sampling Protocols (cont'd.)

Total Unit Count in Property	Quick Reference <b>Minimum Sample Size Required</b> (Please use links above for full details.)		
<b>General Instructions</b>	For Total Housing Unit Count in the Property (A), select at least the corresponding number of housing units below for the sample. Divide the total sample size proportionally across housing unit types in the property (0-BR, 1-BR, 2-BR, etc.), and round up to the nearest whole number.	For Total Affordable Housing Unit Count of Each Housing Unit Type (0-BR, 1-BR, 2-BR, etc.) in the Property (A), select at least the corresponding number of affordable housing units below for the sample.	For Total Housing Unit Count in the Property (A), select all housing units for the sample.
<b>Example - Property Details</b>	For a property with 55 housing units, of which 25 are affordable 1-bedroom units, 10 are market-rate 1-bedroom units, 5 are affordable 2-bedroom units, and 15 are market-rate 2 bedroom units.		
<b>Example - Resultant Sample</b>	The sample set should include a total of 7 housing units, comprised of 4 x 1-bedroom units and 3 x 2-bedroom units.	The sample set should include a total of 25 housing units, comprised of 20 affordable 1-bedroom units and 5 affordable 2-bedroom units.	The sample set should include all 55 housing units.

# Sampling Protocols (cont'd.)

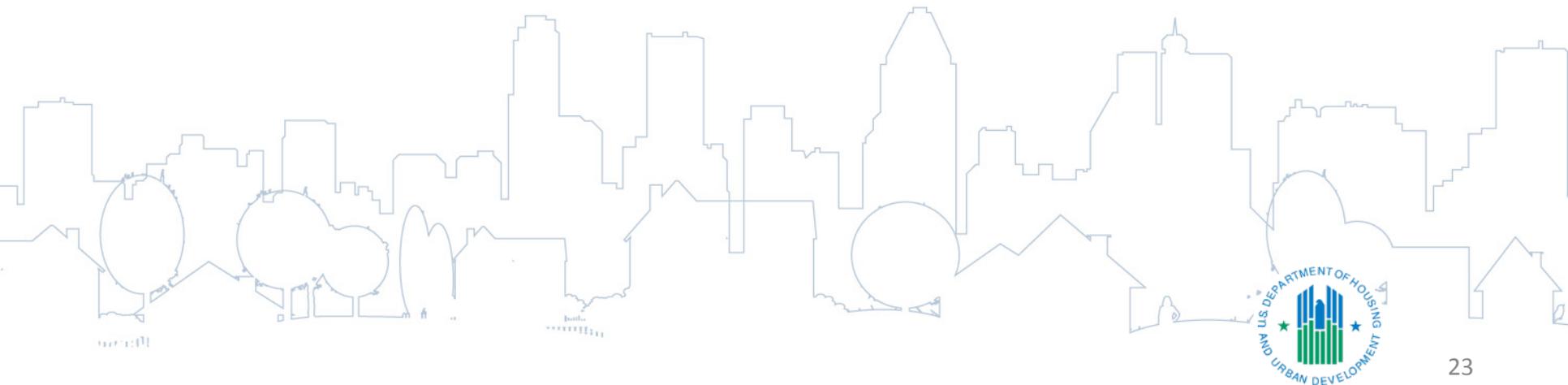
Reference Housing Unit Count (A)	Tier 1 Minimum Sample Size	Tier 2 Minimum Sample Size	Tier 3 Minimum Sample Size
1-4	1	All	All
5-9	2	All	All
10-19	3	All	All
20	4	All	All
21-29	4	20	All
30-49	5	20	All
50-61	6	20	All
62-71	6	21	All
72-74	6	22	All
75-83	7	22	All
84-99	7	23	All
100-120	8	24	All
121-149	8	25	All
150-191	9	26	All
192-200	9	27	All
201-259	10	27	All
260-388	10	28	All
>388	10	29	All

# Translating Sampled Results into Benchmarking Inputs

## Example: Using Sample Data to Calculate Estimated Total Tenant-Paid Electricity Consumption for a Property

Housing Unit Type	One-bedroom	Two-bedroom
Number of Housing Units in Property	150	50
Number of Housing Units Sampled	18	6
Total Electricity Consumption for Sample Set	171,000 kWh	84,000 kWh
Average Electricity Consumption Per Unit	$171,000 \div 18 = 9,500$ kWh/unit	$84,000 \div 6 = 14,000$ kWh/unit
Estimated Total Electricity Consumption for All Housing Units by Type	$9,500 * 150 = 1,425,000$ kWh	$14,000 * 50 = 700,000$ kWh
Estimated Total Tenant-Paid Electricity Consumption for Property	$1,425,000 + 700,000 = 2,125,000$ kWh	

# Demonstration of HUD's *updated* Multifamily Utility Data Collection Database



# The Multifamily Utility Data Collection Database Can Help You To...

- Identify the process for acquiring tenant-paid and/or aggregated data from a utility provider
- Prioritize utility benchmarking efforts in terms of which utility providers present fewer barriers to accessing tenant-paid data
- Determine whether or not to request whole-property, aggregated data or individual tenant-paid data for a property
- Plan for any anticipated challenges associated with accessing tenant-paid data from a utility provider
- Identify contact information for data access support at a utility provider



# HUD Exchange Landing Page

[www.hudexchange.info/programs/utility-benchmarking/utility-data-collection-database/](http://www.hudexchange.info/programs/utility-benchmarking/utility-data-collection-database/)

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## Multifamily Utility Data Collection Database

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[Download the Multifamily Utility Data Collection Database \(XLSX\)](#)

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Select the state where a utility operates to view a profile describing the utility's procedures to release tenant-level and whole building energy use and cost data.

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<a href="#">Georgia</a>	<a href="#">Minnesota</a>	<a href="#">Oklahoma</a>	<a href="#">West Virginia</a>

# Database Main Page

## MULTIFAMILY UTILITY DATA COLLECTION DATABASE

For multifamily building owners with utility accounts paid for by tenants, benchmarking energy consumption can be challenging, in part because each utility provider requires owners to follow a different procedure to access tenant-level energy consumption data.

This database helps owners navigate that challenge with a comprehensive catalogue of many major United States utilities and their procedures to release tenant-level and whole building energy use and cost data. Visit the [HUD Exchange](#) to find utility profiles for each utility in this database.

### THIS DATABASE INCLUDES THE FOLLOWING TABS

#### **TAB 1 - Overview**

This tab documents describes the purpose of the database and definitions for common terms in the database.

#### **TAB 2 - Database**

This tab documents the process for requesting data from many of the major utilities in the United States, and the format(s) in which these utilities share data.

#### **TAB 3 - Rubric**

This tab shows a scoring rubric that the database uses to develop a user-friendly score for each utility.

#### **TAB 4 - Regional Benchmarking Mandates**

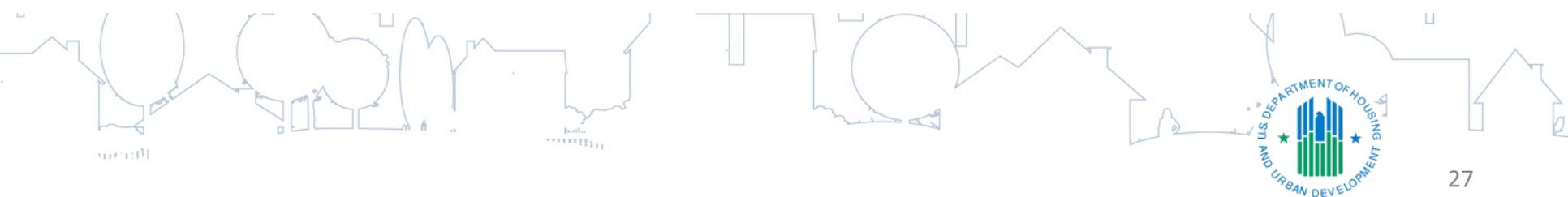
This tab outlines many of the regional benchmarking mandates that apply to residential housing.



# Database Rubric

## DATABASE USER-FRIENDLY SCORING RUBRIC

SCORING METRICS	SCORES			
	1	2	3	4
Provides Tenant Data to Owners	No	Provides monthly average data for each tenant account	Provides total annual whole building data, anonymized	Provides actual monthly tenant-level data
Tenant Data Release Forms	Not applicable - Utility only provides data to account holders	Requires utility-specific release forms or process	Accepts generic release forms	Does not require release form
Tenant Data Comprehensiveness	Not applicable - Utility only provides data to account holders	Historic energy use	Historic energy use and cost data, by billing period	Historic and ongoing data uploads, via Portfolio, or similar
Tenant Data Format	Not applicable - Utility only provides data to account holders	Screen shot, print out and/or PDF	Excel file	Automated upload via Portfolio Manager, or similar



# Xcel Energy Score

## MULTIFAMILY UTILITY DATA COLLECTION DATABASE

Utility Name	User-Friendly Score, from 1 (challenging) to 4 (user-friendly)					Data		
Utility Name	Overall User-Friendly Score	Provides Tenant Data to Owner	Tenant Data Release Forms	Data Comprehensive	Data Format			
Xcel Energy (CO)	4.0	4 Provides actual monthly tenant-level data	4 Does not require release form	4 Historic and ongoing data uploads, via Portfolio, or similar	4 Automated upload via Portfolio Manager, or similar			



# Benchmarking Program Overview

## REGIONAL MULTIFAMILY BENCHMARKING MANDATES

City/ Region	State	Program or Ordinance Name	Authority in Charge	Authority in Charge Email	Authority in Charge Phone
State-wide	CA	<a href="#">California Assembly Bill 802</a>	California Energy Commission	<a href="#">Email CEC</a>	(916) 654-4166



# Utility Profiles - Colorado

[Home](#) > [Programs](#) > [Utility Benchmarking](#) > [Multifamily Utility Data Collection Database](#) > [Utility Profiles - Colorado](#)

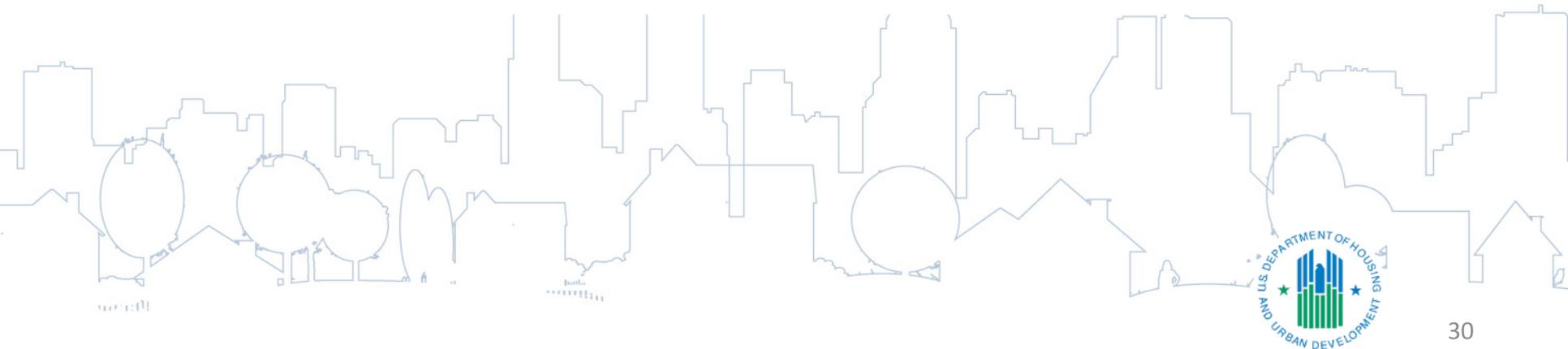
## Utility Profiles - Colorado

These profiles describe the utility's procedures to release tenant-level and whole building energy use and cost data.

[Black Hills Energy](#)

[Public Service Co of Colorado \(Xcel Energy\)](#)

[Xcel Energy \(CO\)](#)



# Utility Profile – Xcel (p. 1)

## MULTIFAMILY UTILITY DATA COLLECTION DATABASE

For multifamily building owners with utility accounts paid for by tenants, benchmarking energy consumption can be challenging, in part because each utility provider requires owners to follow a different procedure to access tenant-level energy consumption data.

This database helps owners navigate that challenge with a comprehensive catalogue of many major United States utilities and their procedures to release tenant-level and whole building energy use and cost data.

This utility profile summarizes the process for requesting data from **Xcel Energy (CO)**. See the back page for detailed instructions and definitions. Visit the [HUD Exchange](#) to find the full utility database.

---

### UTILITY NAME

Xcel Energy (CO)

### USER-FRIENDLY SCORE

1 (most challenging) to 4 (most user-friendly)

*Overall User-Friendly Score:* 4.0

*Provides Tenant Data to Owner Score:* 4  
Provides actual monthly tenant-level data

*Tenant Data Release Forms Score:* 4  
Does not require release form

*Tenant Data Comprehensiveness Score:* 4  
Historic and ongoing data uploads, via Portfolio, or similar

*Data Format Score:* 4  
Automated upload via Portfolio Manager, or similar

*Connected to Portfolio Manager:* Yes

### DATA RELEASE FORMS

[Generic tenant data release form](#)  
[Utility specific tenant data release form](#)

### SERVICE AREA

Colorado

### ADDRESS

Xcel Energy  
PO Box 8  
Eau Claire, WI 54702

### WEBSITE

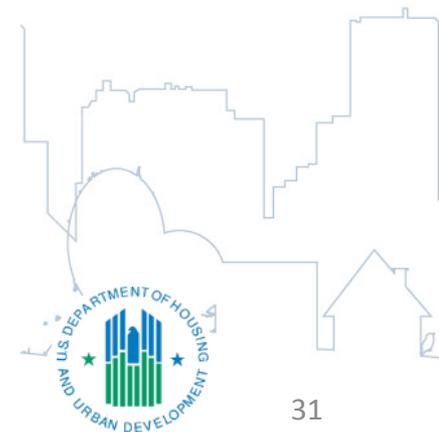
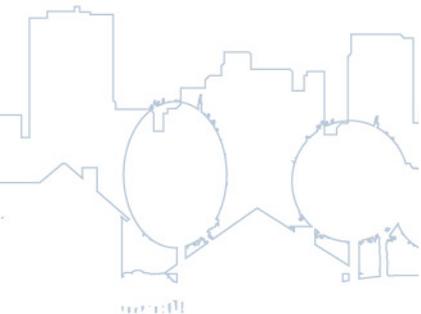
[Utility Energy Usage Request website](#)  
[Utility Benchmarking Website](#)

### CUSTOMER SERVICE CONTACT

Data Request Team  
[Email Data Request](#)  
Phone: 1-800-895-4999  
Fax: 1-866-208-8732

### SUPERVISOR CONTACT

Drew Quirk  
[Email Drew Quirk](#)  
Phone: 1-612-337-2024



# Utility Profile – Xcel (p. 2)

## POTENTIAL CHALLENGES WORKING WITH THIS UTILITY

Challenge 1: Property representative must submit a data release authorization for each tenant. Utility prefers utility-specific release, but accepts generic release authorization if all required information is provided.

## HOW TO REQUEST DATA FROM THIS UTILITY

### HOW TO REQUEST TENANT-LEVEL DATA

Step 1: Owner or owner's representative may send usage history requests to the fax number or email address as provided on the release form. Detailed instructions can be found on the Energy Usage Request website.

Step 2: Within 14 days, the utility will email the property representative a usage history report for the time period as requested on the release form. Statements will display monthly meter read dates and energy use. On a case-by-case basis billing cost history may be included on the statements as well.

### HOW TO REQUEST AGGREGATED WHOLE-BUILDING DATA

Step 1: For properties with 4 or more units, where no one unit uses more than 50% of the total building energy, owner or owner's representative should first configure a Portfolio Manager account, as directed on the utility's benchmarking website. Property representatives should also configure an account on Xcel Energy's benchmarking portal.

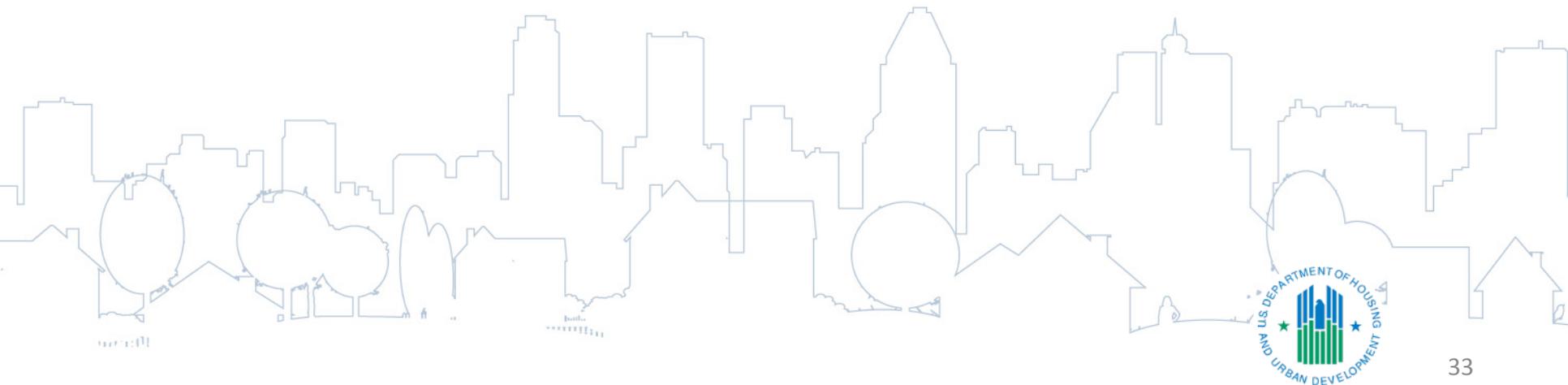
Step 2: Once property representative configures benchmarking portal and Portfolio Manager Web Services accounts, they can connect the accounts. Xcel will provide 24 months of historical and ongoing energy use data to Web Services.

\*Note on score: Because utility provides aggregated data, including tenant spaces, score reflects utility's process for providing aggregated data.

*Disclaimer: This data is current as of 3/29/17. Please note that utilities regularly update energy data release policies. This database includes scores, challenges, and steps associated with obtaining tenant data for multifamily properties, as reported by customer service agents. Contact your utility to confirm their process before requesting data.*



# Demonstration of HUD's *new, optional* Tenant-Paid Utility Data Sampling Calculator



# The Tenant-Paid Utility Data Sampling Calculator Can Help You To...

- Import data about your properties from a HUD [Multifamily Utility Benchmarking Plan](#)
- Calculate appropriate sample sizes for your properties under Tier 1 and Tier 2 protocols
- Identify units to include in each sample
- Track monthly utility data for each unit included in each sample set
- Calculate estimated total tenant-paid utility consumption and cost at each property
- Calculate the resulting Utility Allowance schedule for each property



# HUD Exchange Landing Page

[www.hudexchange.info/resource/133/tenant-paid-utility-data-sampling-calculator/](http://www.hudexchange.info/resource/133/tenant-paid-utility-data-sampling-calculator/)

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Tools and Templates

## Tenant-Paid Utility Data Sampling Calculator

Date Published: April 2017



### Description

This optional tool is designed to help multifamily housing providers apply HUD's Tier 1 and Tier 2 sampling protocols to their properties in order to create an appropriate sample set for utility benchmarking and utility allowance schedules under applicable requirements. The instructions and tips provided within the tool guide users to enter the necessary information about their properties, buildings, housing units, and utility meters, or this information can be imported automatically from a completed [Multifamily Utility Benchmarking Plan Template](#). This tool then determines the number of housing units of each type that should be included in the sample set for each property, and allows users to select which specific housing units to include. Users then enter the monthly utility data for the selected housing units and this tool calculates the estimated, aggregate tenant-paid utility consumption and cost for each property. Using the same data, this tool will also produce a utility allowance schedule for each property.

This tool is a Microsoft Excel workbook with six worksheets and embedded functionality through formulas and macros. The first worksheet is unlocked to allow users to resize rows for easier reading. The other five worksheets are locked to protect formulas and macros, but allow users to input data in necessary cells.

Additional guidance on how this tool can help with utility benchmarking in the multifamily sector can be found on [HUD's Multifamily Utility Benchmarking Toolkit](#).

**Author Organization**

HUD

**Resource Approver**

HUD Approved

# Instructions Tab

## Tenant-Paid Utility Data Sampling Calculator (beta version 1.0)

*NOTE: This tool is currently in a beta version, meaning it may be improved over time. Be sure to carefully follow all instructions and thoroughly check your data; your data is your responsibility. Please refer to the Multifamily Utility Benchmarking portion of the HUD Exchange website if you would like to provide feedback about this tool.*

Organization Name

### How to Use This Tool

This calculator is pre-populated with some example data, which you may choose to leave in place for reference or delete. If you choose to delete data on the Input worksheet, note that column V cannot be edited, so you will need to first select the data before that column and delete, then select the data after that column and delete.

### Step 1: Provide Information about Tenant-Paid Utility Meters

On the Input worksheet, complete the Basic Information section for all tenant-paid utility meters. Organizations using HUD's *Multifamily Utility Benchmarking Plan* tool can automatically import this section from that tool using the "Import Meters from Plan" worksheet. Otherwise, the data should be entered directly into the Input worksheet.

**Use a different row for each utility meter on each property that should be included.** For example, if both electricity and natural gas are tenant-paid at Property A, Unit 1 in Property A will have one row for electricity and one row for natural gas.

**Enter required data in Columns B through G.** The following information is necessary to determine the number of housing units that need to be included in the sample: Property Name, # of Bedrooms, Affordable Housing, Meter Type - Basic, and Meter Type - Detailed.

**Enter optional data in Columns H through T:** These fields provide more detailed information about utility accounts, utility meters, and tenant contact information. This information is helpful for you to determine which housing units will be included in the sample and tracking the collection of tenant utility data release forms.

### Step 2: Determine Unique Property-Utility Combinations

On the Output worksheet, click "Update Property/Meter Combinations" in the upper left corner of the page. This step may take some time, so be sure to allow the workbook time to re-calculate.

**This tool accommodates up to 1,125 unique property/utility type combinations, and up to 375 unique properties.** This could mean 375 properties, each with 3 different utility types, for example. If your organization's portfolio creates more than 1,125 unique combinations, you should allocate the portfolio across multiple files of this tool. This tool performs an internal check and will notify you if there is an issue before outputs can be generated.

This step will also populate the property names on the "Utility Allowance Schedules" worksheet.

Instructions

Import Meters from Plan

Input

Output

Data for Portfolio Manager

Utility Allowance Schedules





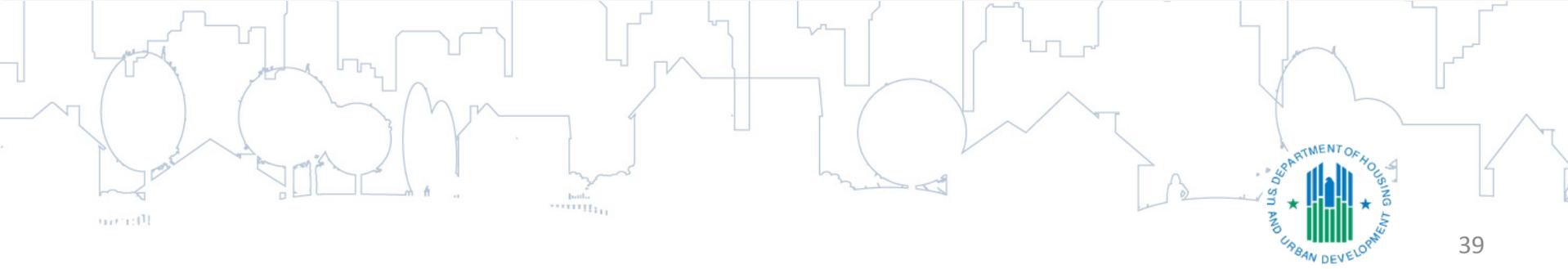
# Input Tab

Step 1: Provide Information about Tenant-Paid Utility Meters (Required)						Step 1: Provide Information about Tenant-Paid Utility Meters (Optional)			
Information Required to Determine Sample Size						Optional Utility Meter/Account Information (Recommended for Housing Units Selected to Include in the Sample)			
Property Name	Housing Unit Number	Affordable Unit? (HUD, USDA, LIHTC)	# of Bedrooms	Meter Type - Basic	Meter Type - Detailed	Portfolio Manager Meter Name	Utility Provider Name	Utility Meter #	Current
Example Property	Unit 1	Yes	1 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333450	567891
Example Property	Unit 2	Yes	1 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333451	567891
Example Property	Unit 3	Yes	1 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333452	567891
Example Property	Unit 4	No	1 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333453	567891
Example Property	Unit 5	No	1 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333454	567892
Example Property	Unit 6	Yes	2 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333455	567892
Example Property	Unit 7	Yes	2 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333456	567892
Example Property	Unit 8	No	2 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333457	567892
Example Property	Unit 9	No	2 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333458	567892
Example Property	Unit 10	No	2 Bedroom	Electricity	Electricity - Grid Purchase	Example Property - Electricity	Electric Company A	111222333459	567892
Example Property	Unit 1	Yes	1 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4567	999871
Example Property	Unit 2	Yes	1 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4568	999871
Example Property	Unit 3	Yes	1 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4569	999871
Example Property	Unit 4	No	1 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4570	999871
Example Property	Unit 5	No	1 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4571	999871
Example Property	Unit 6	Yes	2 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4572	999871
Example Property	Unit 7	Yes	2 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4573	999871
Example Property	Unit 8	No	2 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4574	999871
Example Property	Unit 9	No	2 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4575	999871
Example Property	Unit 10	No	2 Bedroom	Natural Gas	Natural Gas	Example Property - Natural Gas	Gas Provider A	9999-4576	999871



# Output Tab

Update Property/Meter Combinations		Number of Housing Units												Step 3: Determine the Number of Housing Units to Include in the Sample										Step 5: En	
Property Information		Total Number of Housing Units						Number of Affordable Housing Units						Housing Units required for Tier 1 sampling					Affordable Units required for Tier 2 sampling					Total Housing	
Property Name	Meter Type - Detailed	Total	0BR	1BR	2BR	3BR	4BR	5+BR	Total	0BR	1BR	2BR	3BR	4BR	5+BR	Total	0BR	1BR	2BR	3BR	4BR	5+BR	Total	0BR	
Example Property	Electricity - Grid Purchase	10	0	5	5	0	0	0	5	0	3	2	0	0	0	4	0	2	2	0	0	0	5	0	3
Example Property	Natural Gas	10	0	5	5	0	0	0	5	0	3	2	0	0	0	4	0	2	2	0	0	0	5	0	3



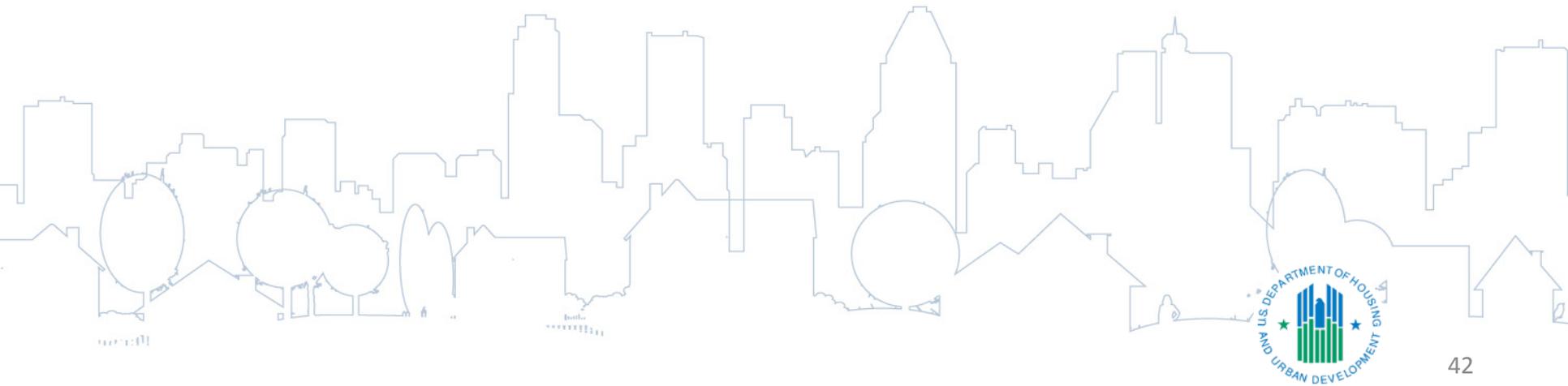
# Data for Portfolio Manager Tab

	A	B	C	D	E	F
1	<b>Step 6: Obtain Estimated, Aggregate Tenant-Paid Utility Data for Use in ENERGY STAR Portfolio Manager</b>					
2						
3	<b>Select a Property:</b>	Example Property				
4	<b>Select a Meter Type:</b>	Electricity - Grid Purchase				
5	<b>Unit of Measurement:</b>	kWh				
6						
7	<b>Start Date</b>	<b>End Date</b>	<b>Usage</b>	<b>Cost</b>	<b>Estimation</b>	
8	7/1/2016	8/1/2016	9,371.7	\$ 1,175.70	Yes	
9	8/1/2016	9/1/2016	10,027.7	\$ 1,254.42	Yes	
10	9/1/2016	10/1/2016	10,729.6	\$ 1,338.65	Yes	
11	10/1/2016	11/1/2016	11,480.7	\$ 1,428.78	Yes	
12	11/1/2016	12/1/2016	12,284.3	\$ 1,525.22	Yes	
13	12/1/2016	1/1/2017	10,687.4	\$ 1,333.59	Yes	
14	1/1/2017	2/1/2017	9,298.0	\$ 1,166.86	Yes	
15	2/1/2017	3/1/2017	8,089.3	\$ 1,021.81	Yes	
16	3/1/2017	4/1/2017	7,037.7	\$ 895.62	Yes	
17	4/1/2017	5/1/2017	6,122.8	\$ 785.83	Yes	
18	5/1/2017	6/1/2017	6,122.8	\$ 785.83	Yes	
19	6/1/2017	7/1/2017	9,371.7	\$ 1,175.70	Yes	
20						
21						
22						





# What's Next?



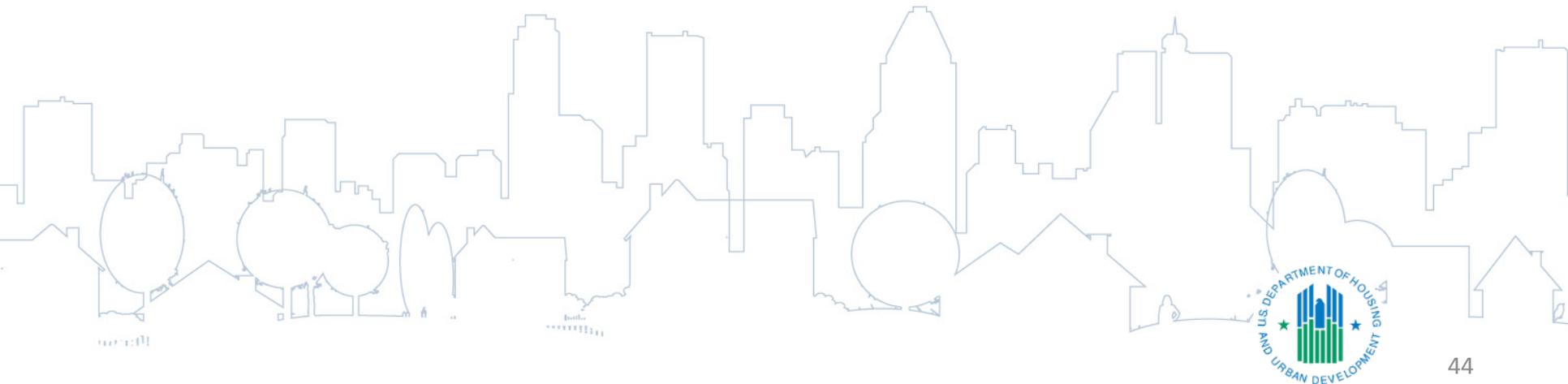
# Upcoming Webinars and Events

- May 4  
Webinar 4: Using Software and Entering Data for Multifamily Utility Benchmarking
- May 11  
Webinar 5: Sharing Multifamily Utility Benchmarking Results and Building on Success
- May 15 – 17  
Better Buildings Summit, Washington, DC
- June 1  
Webinar 6: Multifamily Utility Benchmarking Requirements and Funding Opportunities

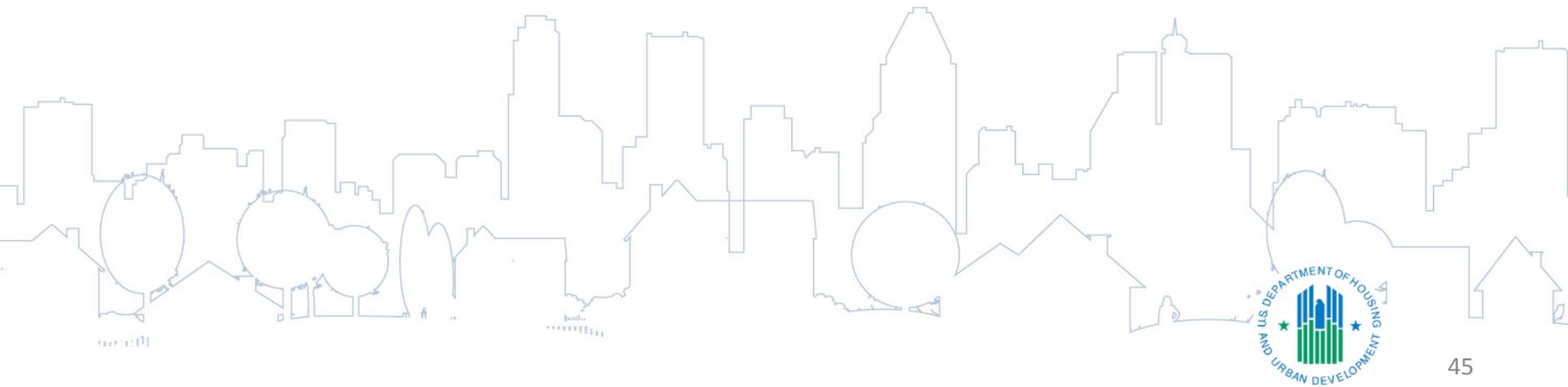


# Be Sure to Register!

- Go to “Events and Training” on the [HUD Exchange Utility Benchmarking website](#) for links to each upcoming webinar’s registration page.
- If you missed a previous webinar, go to the Archive section under “Events and Training” for links to each webinar’s recording and other resources.



# Questions?



# Related Resources

- [HUD Multifamily Utility Benchmarking Toolkit](#)
- [HUD Tenant-Paid Utility Data Sampling Calculator](#)
- [HUD Multifamily Utility Data Collection Database](#)
- [U.S. EPA Map and Fact Sheet: Utilities Providing Access to Whole-Building Energy Consumption Data](#)



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Thank you, and we'll  
see you next week for  
Webinar 4!

