

HUD Multifamily Utility Benchmarking Webinar Series

Webinar 2: Creating a Plan and Managing Data for Multifamily Utility Benchmarking

April 20, 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”



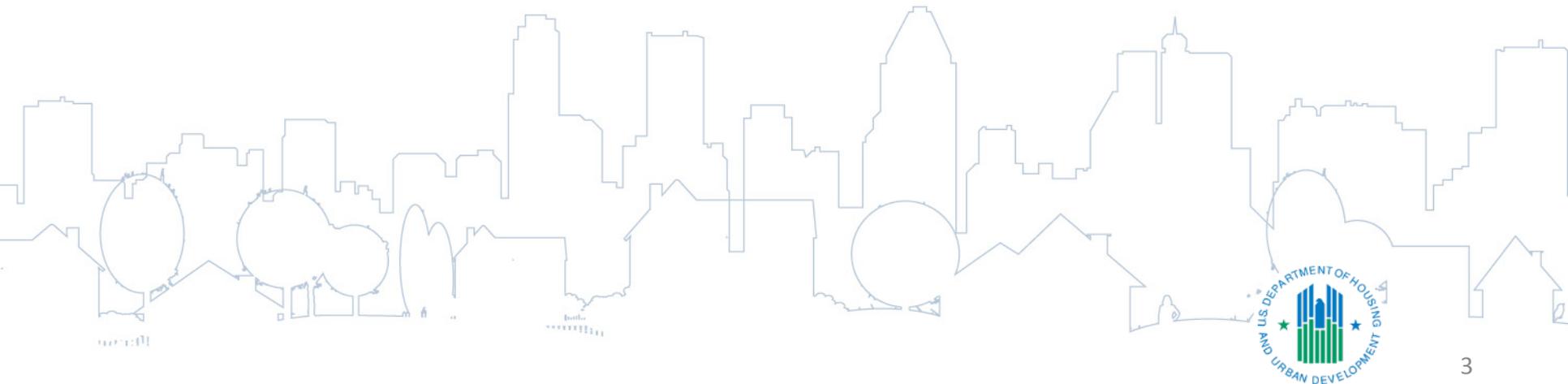
Presenters

Host

- Julia Hustwit,
US Department of Housing and Urban Development

Speakers

- Scott Ledford, ICF
- Sara Lisauskas, ICF



Today's Webinar

- Second 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 Utility Benchmarking website](#).

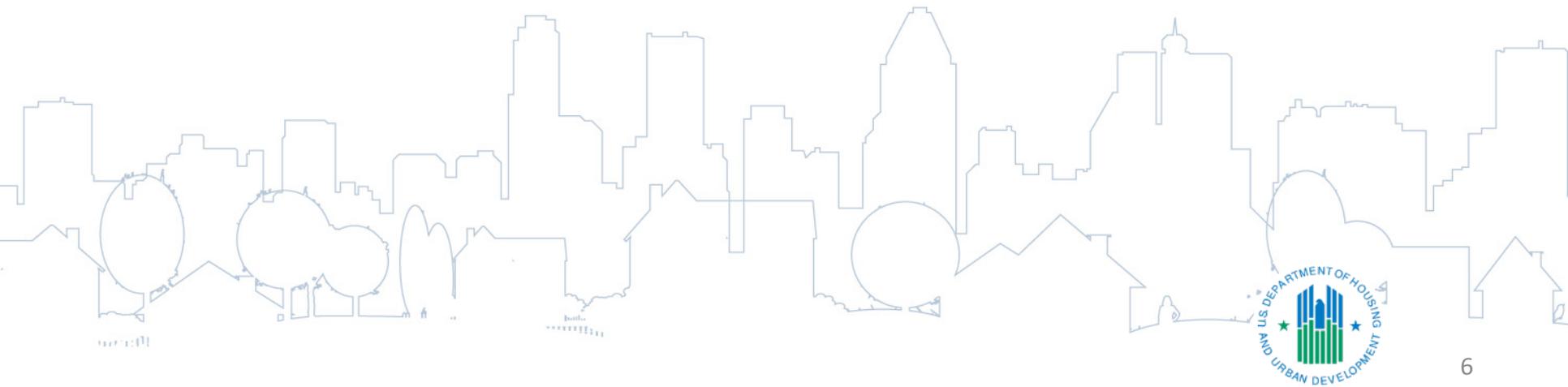


Learning Objectives

- In this session, you will:
 - Learn about the benefits of creating a plan for utility benchmarking, in order to document and manage key information needed during the process;
 - Identify key elements that should be included in any utility benchmarking plan;
 - Receive a demonstration of using HUD's new Multifamily Utility Benchmarking Plan template; and
 - Gain an understanding of how a completed Plan can be used to upload data into the ENERGY STAR® Portfolio Manager® benchmarking tool.



Perspective on the Effort Involved in Multifamily Utility Benchmarking



Data + Tool(s)

- Utility benchmarking is primarily a process of organizing data and entering it into a software tool.
- It is a task regularly accomplished by in-house staff, summer interns, or third-party providers.
- No special skills are required beyond understanding the process and familiarizing oneself with ENERGY STAR Portfolio Manager.
- The amount of effort involved in multifamily utility benchmarking depends on several factors:



Set-Up & Data Entry

a) Initial Set-Up and Learning Curve

- The first time you perform utility benchmarking, a bit more effort will be required to compile the basic information about your portfolio and get your account set up in the software.
- Subsequent utility benchmarking efforts should involve a small fraction of the effort -- particularly if you keep organized records, such as in a Utility Benchmarking Plan.

b) Data Entry

- The effort associated with data entry can vary with the size and complexity of the housing portfolio.
- Options for automation and partial automation include:
 - automatic data transfer from utility providers,
 - automatic data transfer from third-party providers,
 - spreadsheet upload tools.



Owner-Paid Utility Accounts

c) Utility Data Collection - Owner-Paid Utility Accounts

- Property owners should already have their utility data from owner-paid utility accounts.
- Public Housing Authorities already report utility consumption information from owner-paid accounts each year to HUD, so no difficulty should be encountered.
- All property owners use the cost information from owner-paid utility bills for accounting, so taking note of the consumption information from the same bills should not be a challenge.
- 46% of public housing properties and 36% of assisted housing properties supported by HUD use *only* owner-paid utility accounts.
 - In these cases, no additional utility data collection is needed.



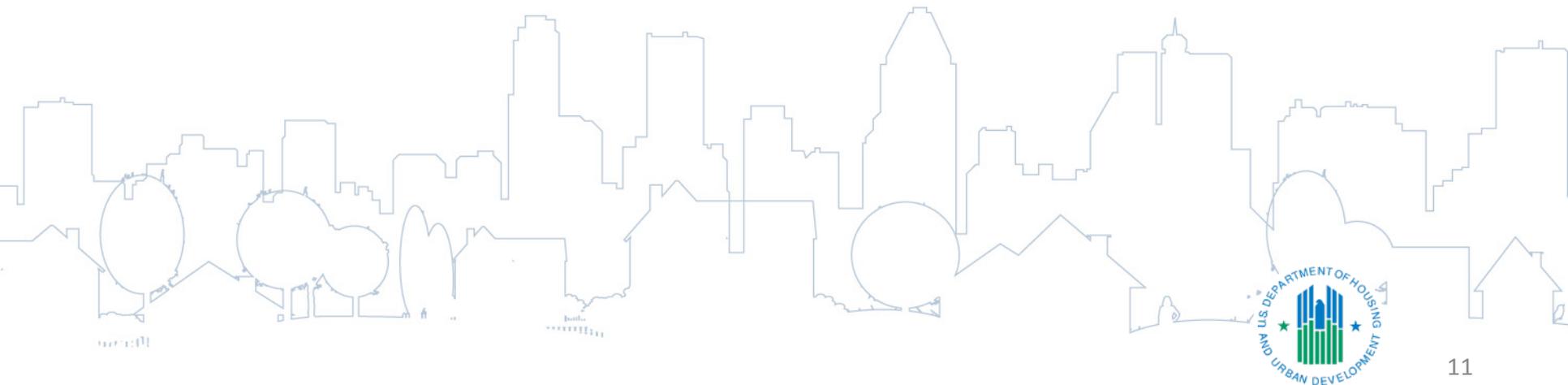
Tenant-Paid Utility Accounts

d) Utility Data Collection - Tenant-Paid Utility Accounts

- Most multifamily properties do have at least one tenant-paid utility account, so collecting some additional information beyond that found on the owner-paid bills is necessary.
- HUD-assisted properties are already required to collect cost data from tenant-paid utility bills in order to generate their utility allowance schedules.
 - The utility consumption data from the same tenant-paid utility bills can also be used for utility benchmarking; no additional utility bill collection is required in these cases.
- All housing providers in California, as well a growing number of other locations, have access to aggregated, whole-property data from their utility providers.
 - In these cases, it is not necessary to collect individual tenant-paid utility data.



Preparing Your Approach to Utility Benchmarking



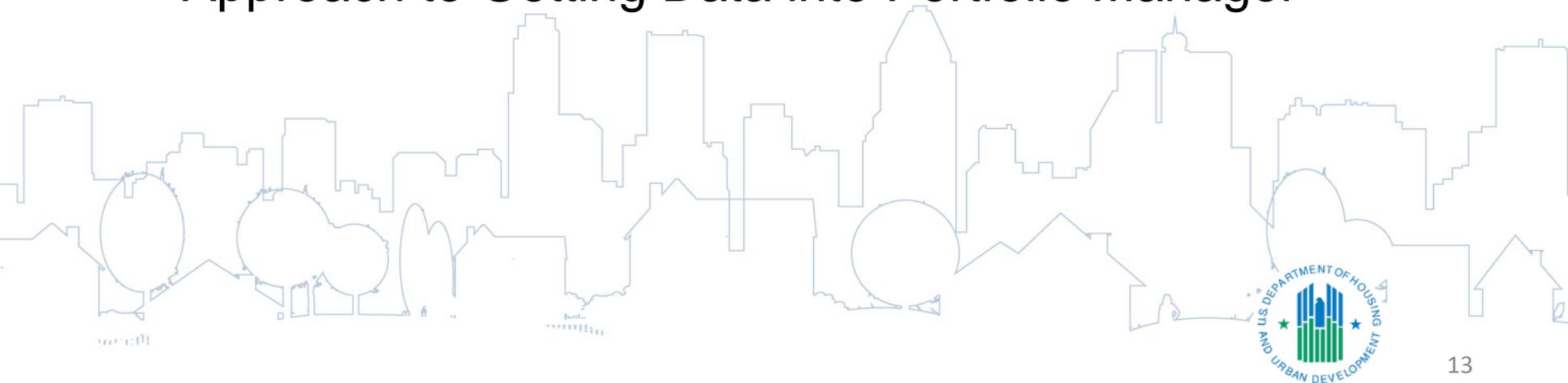
What is a Utility Benchmarking Plan?

- Utility Benchmarking Plans range in formality from a series of sticky notes to a fully detailed strategy.
 - HUD recommends that organizations take the time to document core information about their portfolio and their processes in a central location for easy reference.
 - The level of detail should reflect the complexity of your portfolio.
- An ideal Utility Benchmarking Plan should:
 - Serve as a “living” repository of information about your portfolio.
 - Document roles, responsibilities, and decisions.
 - Help your organization maintain knowledge



What Information Should be Included in a MF UB Plan?

- Organizational Information
- Local Policy Context
- Property/Portfolio Information
- Utility Provider Information
- Approach to Tenant-Paid Utility Data Collection
- Approach to Getting Data into Portfolio Manager



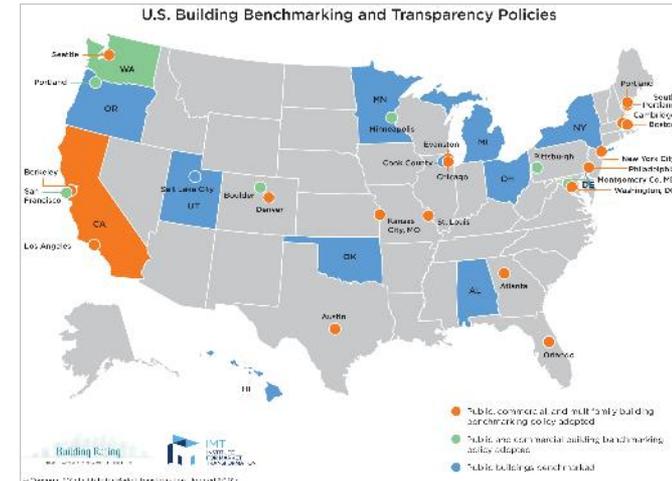
Organizational Information

- Identify top-level “champion(s)” to establish buy-in
- Identify utility benchmarking lead(s) to manage the process on an ongoing basis
- Take stock of other internal staff that may be needed and/or can be helpful
- Consider additional/external resources that may be needed and/or can be helpful



Local Policy Context

- Understand any state/local benchmarking requirements that may affect your properties
- Be familiar with specific requirements for specific jurisdictions
 - What needs to be benchmarked (e.g., entire property vs. individual buildings)?
 - What are the reporting requirements (e.g., annual deadline)?



Property/Portfolio Information

- Number and type of properties
 - Number of buildings per property
 - Number of units per building/property
 - Breakdown of unit types (e.g., 1BR, 2BR)
- Metering details
 - Utilities consumed/billed at property (including both energy and water)
 - Location and coverage of meters
- Property use characteristics
 - Specific items required by Portfolio Manager



Property/Portfolio Information (cont'd.)

Sample Housing Portfolio

Property 1 – 65 Units

Building A
65 units

Property Level Meters

- 1 electric meter, paid by property owner
- 1 gas meter, paid by property owner
- 1 water meter, paid by property owner

Property 2 – 120 Units

Building A - 40 units

Building B - 40 units

Building C - 40 units

Office & Clubhouse

Unit Level Meters

120 electric meters, paid by tenants

Building Level Meters

- 4 gas meters, paid by property owner
- 4 water meters, paid by property owner

Property Level Meters

- 1 electric meter, paid by property owner
(for common / exterior spaces)

Property 3 – 20 Units

Building A - 4 units

Building B - 4 units

Building C - 4 units

Building D - 4 units

Building E - 4 units

Unit Level Meters

- 20 electric meters, paid by tenants
- 20 gas meters, paid by tenants
- 20 water meters, paid by tenants

Property Level Meters

- 1 electric meter, paid by property owner
(for common / exterior spaces)

Approach to Tenant-Paid Utility Data Collection

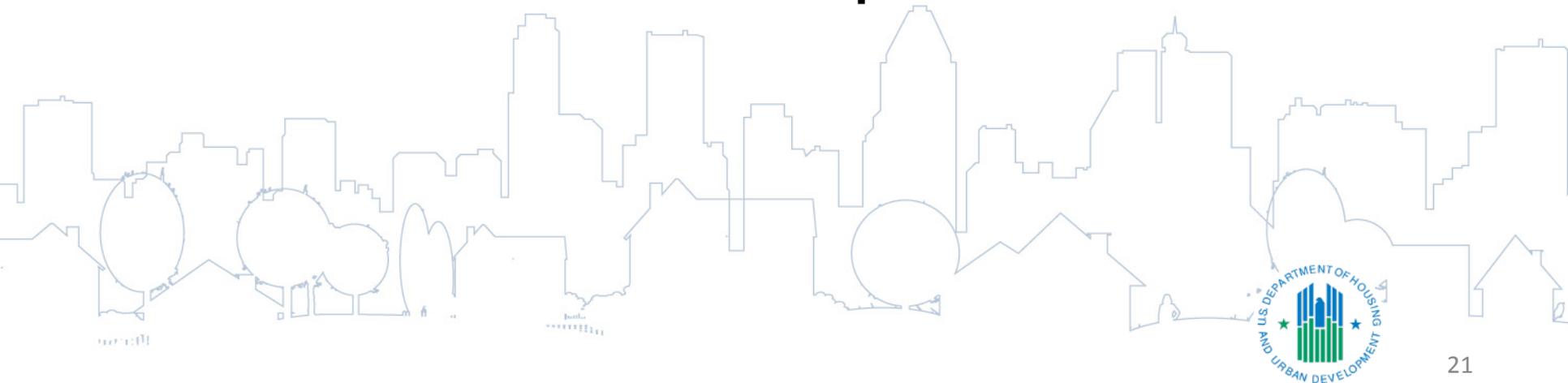
- Method A
 - All utilities are owner-paid; no need to collect additional utility data
- Method B
 - Owner can obtain aggregated, whole-property utility data from their utility providers
- Method C
 - Owner collects 100% of tenant-paid utility data
- Method D
 - Owner collects a sample of tenant-paid utility data, and extrapolates to estimate total tenant-paid utility data

Approach to Getting Utility Data Into Portfolio Manager

- Manual entry
- Spreadsheet-based bulk data entry
 - Can also be assisted through HUD's Multifamily Utility Benchmarking Plan Template!
- Portfolio Manager web services
 - Automated data entry by a 3rd party
 - Can be a fee-based service offering from a provider
 - Many utility providers also offer this service – usually in conjunction with the delivery of aggregated, whole building data



Demonstration of HUD's *new, optional* Multifamily Utility Benchmarking Plan template



What Can HUD's MF UB Plan Template Help You Do?

- Assign and track organizational roles, responsibilities, and resources for utility benchmarking
- Catalog your portfolio
- Identify and record the utility accounts located at your properties, including associated meters
- Document your planned approach to collecting, categorizing, and aggregating meter data
- Gather property attribute data needed for benchmarking in Portfolio Manager
- Export property information into Portfolio Manager spreadsheet upload templates
- Export information into HUD's Tenant-Paid Utility Data Sampling Calculator



HUD Exchange Landing Page

www.hudexchange.info/resource/8/multifamily-utility-benchmarking-plan-template/

Resources and assistance to support HUD's community partners



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Tools and Templates

Multifamily Utility Benchmarking Plan Template

Date Published: April 2017



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Description

This optional tool is designed to help multifamily housing providers gather, manage, and maintain the information and data necessary to undertake utility benchmarking. The instructions and tips provided within the tool guide users to catalog their properties and portfolios appropriately so they can correctly set up and enter their property and utility data in ENERGY STAR® Portfolio Manager®. This tool even offers an automated data export feature directly into Portfolio Manager spreadsheet uploads, for users who choose this option for entering their utility benchmarking data into Portfolio Manager. Data maintained in this tool can also be imported directly into a [Tenant-Paid Utility Data Sampling Calculator](#) to help simplify the completion of that tool when it is needed.

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 add additional rows to tables and 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](#).

Persons using assistive technology may not be able to fully access information in this file. For assistance, contact info@hudexchange.info.

Author Organization

HUD

Resource Approver

HUD Approved

Benchmarking Plan Tab

Multifamily Utility Benchmarking Plan *(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 planning template is designed to help your organization catalog basic information about its portfolio of multifamily properties and document its preferred approach to utility benchmarking for easy reference. It can also help set up your organization's ENERGY STAR Portfolio Manager account. Use of this tool is optional, but keeping information organized is the key to successful utility benchmarking. To get started, complete the information below to help plan your organization's preferred approach. Then, enter data about your properties and utilities on the following worksheets.

Tool tips are provided for many fields on the following worksheets - simply click on the header cell of a column to see any additional information about what should be included for that field. Note that if you move a tool tips around the screen, tool tips for other fields will then also appear in that location on the screen. In order for tool tips to start showing up next to their associated column again, you will need to close and re-open the tool (be sure to save any new work before closing the file!)

This planning template is pre-populated with some example data, which may be deleted if you prefer. If you prefer to keep the example data for reference, just be sure not to include these example properties or meters in any of the Portfolio Manager spreadsheet uploads you may generate on the last worksheet. Otherwise, the sample properties will then appear in your organization's Portfolio Manager account.

Avoid copying and pasting whenever possible in this planning template, as many cells contain data validation that will be overwritten if data is pasted into the cell. Also avoid changing the formatting of cells, as this may affect the functionality of any Portfolio Manager uploads.

Utility Benchmarking Goals

Describe the goals associated with your organization's utility benchmarking efforts. They may include one or more of the following:

- Create an energy and water management plan, identify quick fixes, and target capital improvements
- Report property performance information and track utility costs for federal government programs (HUD, USDA, etc.)
- Set goals for property performance, cost savings, greenhouse gas reductions, etc., and track progress
- Report property performance information and progress towards goals for voluntary programs, like Better Buildings Challenge, MIP Reduction, green building certifications, etc.

Benchmarking Plan

Property Information

Utility Providers

Utility Meters

Portfolio Manager Meters

Upload to Portfolio Manager



Benchmarking Plan Tab (cont'd.)

Utility Benchmarking Goals

Describe the goals associated with your organization's utility benchmarking efforts. They may include one or more of the following:

- Create an energy and water management plan, identify quick fixes, and target capital improvements
- Set goals for property performance, cost savings, greenhouse gas reductions, etc., and track progress
- Obtain ENERGY STAR Certification for properties
- Report property performance information and track utility costs for federal government programs (HUD, USDA, etc.)
- Report property performance information and progress towards goals for voluntary programs, like Better Buildings Challenge, MIP Reduction, green building certifications, etc.
- Report property performance information for local government programs

Utility Benchmarking Lead(s)

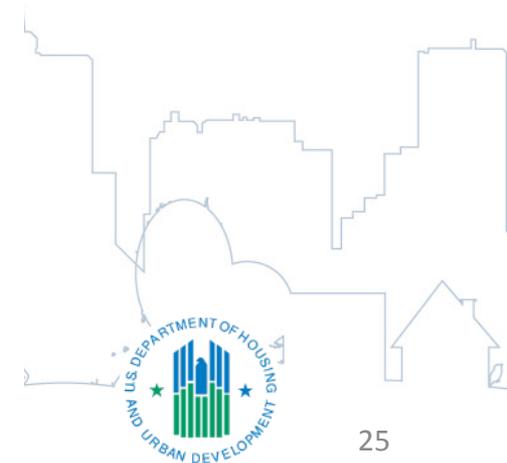
The following individual(s) will lead the implementation of the organization's utility benchmarking plan, including collecting and aggregating data from multiple sources, entering data into Portfolio Manager, sharing and interpreting results, and providing management support.

Name	Organization	Role	Phone Number	Email Address

Utility Benchmarking Key Contact(s)

The following individuals can provide information and/or support necessary for the completion of utility benchmarking. List points of contact at utility providers, as well as information for third-party utility benchmarking service providers. This information should be updated regularly.

Name	Organization	Type of Information/Support	Phone Number	Email Address



Benchmarking Plan Tab (cont'd.)

Portfolio Information

The information necessary to understand and benchmark energy and water performance is addressed on the subsequent worksheets in this workbook. The column headings identified on these worksheets are consistent with those found on the Portfolio Manager spreadsheet templates that are offered as a means for uploading data. This can be especially helpful for organizations planning to upload data to Portfolio Manager via spreadsheet template.

Worksheet Title	Information Addressed
Property Information	Property information needed for utility benchmarking (square feet, number of buildings, number of units, etc.)
Utility Providers	Summary of utility providers and policies for requesting utility data
Utility Meters	A full accounting of all utility meters present in the portfolio
Portfolio Manager Meters	Details on how utility meters will be entered in Portfolio Manager (ex. some utility meters may be aggregated before entering)

The column headings on the subsequent worksheets in this workbook are color-coded as follows, which is also consistent with the color-coding found on the Portfolio Manager spreadsheet templates that are used for uploading data:

Required by ENERGY STAR Portfolio Manager
Optional in ENERGY STAR Portfolio Manager
Additional fields useful for assessing a portfolio and planning a benchmarking approach

Plans for Collecting and Entering Data into ENERGY STAR Portfolio Manager

(a) Describe how your organization will collect basic property data (one-time effort) and monthly utility data (on-going effort). Are all properties fully supported by owner-paid utility accounts? If not, will aggregated, whole-property utility data be available from your utility providers in all cases? If not, will your organization collect 100% of tenant-paid utility bills, or a sample? How will these be collected? Alternatively, will your organization contract with a third-party utility benchmarking provider for some or all of these services?

(b) Describe how your organization will enter data into Portfolio Manager, initially and on an on-going basis. Will automated utility data transfer from your organization's utility providers be available in all cases? If not, will your organization use Portfolio Manager spreadsheet templates to upload data, or will data be entered manually? Alternatively, will your organization contract with a third-party utility benchmarking provider for some or all of these services?

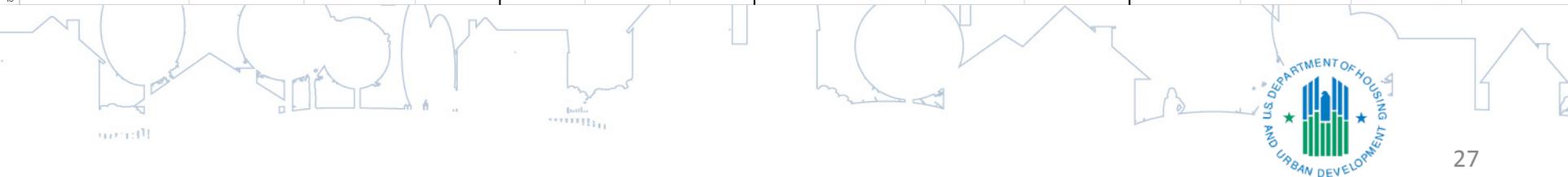


Property Information Tab

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
HUD Property REMS ID	HUD Property AMP ID	USDA Property AMAS ID	Property Name	Street Address	Street Address 2	City/Municipality	State	Postal Code	Year Built/Year Planned for Construction Completion	Gross Floor Area (Sq. Ft.)	Percent of Property That Can Be Heated	Percent of Property That Can Be Cooled	Occupancy (%)	Property Structure	Number of Buildings (for Multi-Building Properties)
		654321	Example Property A	111 A Street	# 100	Anchorage	AK	99502	2000	100000	All of it - 100%	0%	85	Single Building Property	
	PA-123-456789		Example Property B	222 B Street		Bethel	PA	19507	2001	200000			90	Single Building Property	
1234567890			Example Property C	333 C Street		Camarillo	CA	93010	2002	300000	40%	All of it - 100%	95	Multi-building Property	3
			Example Property D	444 D Street	# 400	Dover	DE	19901	2003	400000	All of it - 100%	All of it - 100%	100	Multi-building Property	4

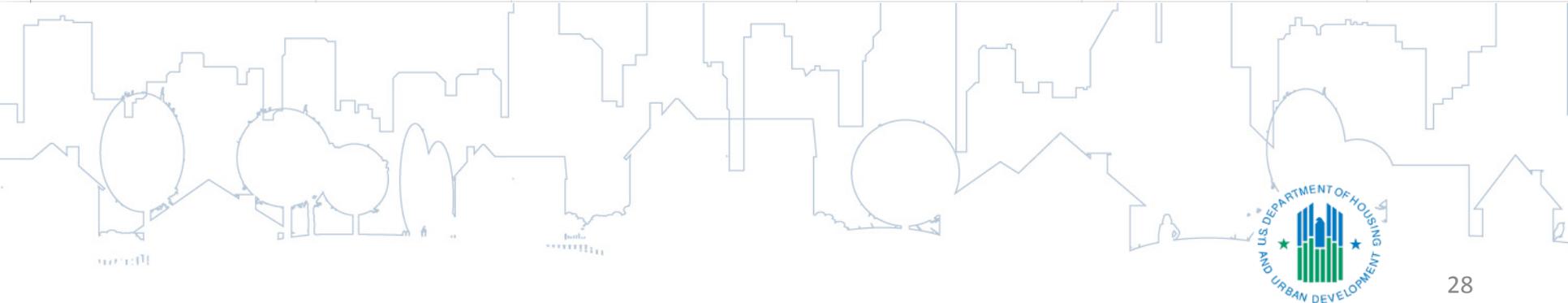
Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF
Irrigated Area	Irrigated Area Units of Measure	Total Number of Residential Living Units	Number of Residential Living Units in a Low-rise Setting (1-4 stories)	Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	Number of Residential Living Units in a High-rise Setting (10 or more stories)	Total Number of Bedrooms	Number of 0 Bedroom Units/Studios	Number of 1 Bedroom Units	Number of 2 Bedroom Units	Number of 3 Bedroom Units	Number of 4+ Bedroom Units	Number of Laundry Hookups in All Units	Number of Laundry Hookups in Common Area(s)	Resident Population Type	Government Subsidized Housing
5	Acres	100	40	50	10	100		100				100		10 No specific resident population	Yes
		200	80	100	20	300									Yes
10000	Sq. Ft.	300	120	150	30	450									Yes
		400	160	200	40	600	50	200	100	50		0	50		No

AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT
Federal Housing Support Type	Number of Units Federally Supported	Reporting Under a Local Government Disclosure Program?	Level at which Benchmarking is Required	Open Parking Lot Size (Sq. Ft.)	Partially Enclosed Parking Garage Size (Sq. Ft.)	Completely Enclosed Parking Garage Size (Sq. Ft.)	Approximate Pool Size	Location of Pool (Required if Approximate Pool Size is not blank)	Months in Use per Year (Required if Approximate Pool Size is not blank)	Additional Unique Identifier #1 - Type	Additional Unique Identifier #1 - ID	Additional Unique Identifier #2 - Type	Additional Unique Identifier #2 - ID
USDA Rural Housing	50	No	Property				Recreational (20 yards x 15 yards)	Indoor	12	LEED US Project ID	123456	U.S. Federal Real Property	54321
HUD Public Housing	50	No	Property	10000	0	0	Short Course (25 yards x 20 yards)	Indoor	12				
HUD Insured-Only Housing	100	No	Property	20000	20000	0	Olympic (50 meters x 25 meters)	Outdoor	6			BCMA BEST Building ID	55555
		Yes	Building	30000	30000	30000				BCMA BEST Building ID	77777		



Utility Providers Tab

	A	B	C	D	E	F
	Utility Provider Name	Utility Type	Provides aggregated, whole property utility data?	Process for requesting tenant-paid utility account data?	Methods for setting up automatic transfer of utility data to Portfolio Manager?	Notes
2	Electric Company #1	Electricity	No	Drop off release form, request in person	none	none
3	Electric Company #2	Electricity	Yes	Mail release form, request via phone	none	none
4	Gas Provider 1	Natural Gas	Yes	Scan and submit release form, request via w	none	none
5	Gas Provider 2	Natural Gas	No	Drop off release form, request in person	none	none
6	Municipal Water Provider	Water	Yes	Mail release form, request via phone	none	none
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						



Utility Meters Tab

Complete for EVERY Utility Meter

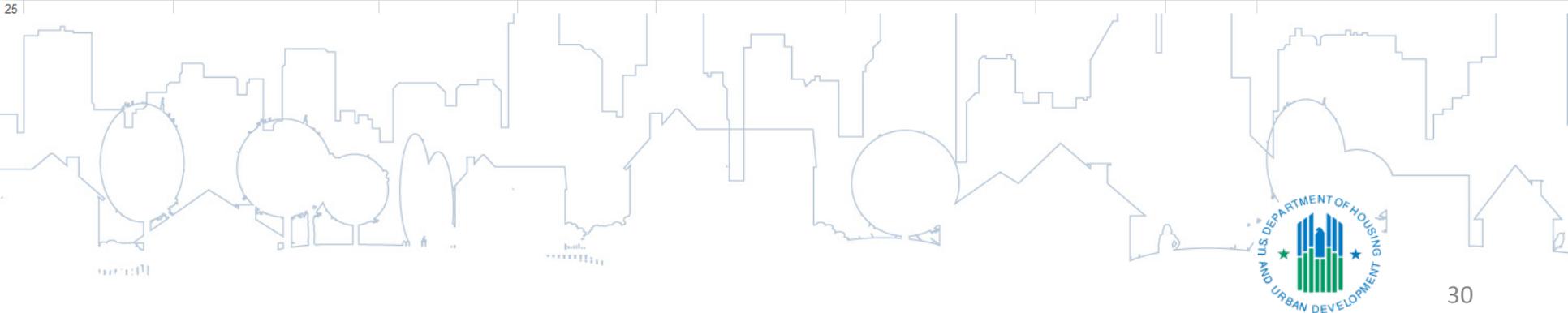
Property Name	Meter Type - Basic	Meter Type - Detailed	Paid By	Space Served	Housing Unit Number (if applicable)	Utility Data Collection Method	Utility Provider Name	Utility Meter #	Current Account #	Account Address: Street Address
Example Property A	Electricity	Electricity - Grid Purchase	Tenant	Individual Housing Unit	Unit 1	Method C	Electric Company #1	111222333444	5678910	111 A St
Example Property A	Natural Gas	Natural Gas	Tenant	Individual Housing Unit	Unit 1	Method C	Gas Provider 1	111222333444	5678911	111 A St
Example Property A	Water	Potable Indoor	Tenant	Individual Housing Unit	Unit 1	Method C	Municipal Water Provider	111222333444	5678912	111 A St
Example Property B	Electricity	Electricity - Grid Purchase	Owner	Whole Property	N/A	Method A	Electric Company #1	111222333444	5678913	222 B St
Example Property B	Natural Gas	Natural Gas	Owner	Whole Property	N/A	Method A	Gas Provider 1	111222333444	5678914	222 B St
Example Property B	Water	Potable Indoor	Owner	Whole Property	N/A	Method A	Municipal Water Provider	111222333444	5678915	222 B St
Example Property C	Electricity	Electricity - Grid Purchase	Tenant	Individual Housing Unit	Unit 3	Method B	Electric Company #2	111222333450	5678916	333 C St
Example Property C	Natural Gas	Natural Gas	Owner	Whole Property	N/A	Method B	Gas Provider 2	111222333451	5678917	333 C St
Example Property C	Water	Potable Indoor	Owner	Common Area	N/A	Method B	Municipal Water Provider	111222333452	5678918	333 C St
Example Property D	Electricity	Electricity - Grid Purchase	Tenant	Individual Housing Unit	Unit 5	Method D	Electric Company #2	111222333453	5678919	444 D St
Example Property D	Electricity	Electricity - Grid Purchase	Tenant	Individual Housing Unit	Unit 6	Method D	Electric Company #2	111222333454	5678920	444 D St
Example Property D	Natural Gas	Natural Gas	Owner	Whole Property	N/A	Method D	Gas Provider 2	111222333455	5678921	444 D St
Example Property D	Water	Potable Indoor	Owner	Whole Property	N/A	Method D	Municipal Water Provider	111222333456	5678922	444 D St

Complete Only for Housing Unit Utility Meters

Account Address: State	Account Address: ZIP/Postal Code	Building Name/Number (Optional)	Premise Number or Other Unique Identifier (Optional)	Current Account Holder's Name	Current Account Holder's Phone Number	Current Account Holder's Email Address	Number of Bedrooms (Required if using Utility Data Collection Method D)	Utility Release Form Obtained?	Notes about Previous Account #'s (Optional)	Portfolio Manager Meter Name (Fill out Portfolio Manager Meters tab first)
AK	99502	Bldg 1		Amy Allen	907-555-4321	aa@example.com	2	Yes		Example Property A - Electricity
AK	99502	Bldg 1		Amy Allen	907-555-4321	aa@example.com	2	Yes		Example Property A - Natural Gas
AK	99502	Bldg 1		Amy Allen	907-555-4321	aa@example.com	2	Yes		Example Property A - Water
PA	19507		1234	Bob Briggs	717-111-1111	bb@example.com		Yes		Example Property B - Electricity
PA	19507		1234	Bob Briggs	717-111-1111	bb@example.com		Yes		Example Property B - Natural Gas
PA	19507		1324	Bob Briggs	717-111-1111	bb@example.com		Yes		Example Property B - Water
CA	93010			Casey Charles	805-222-2222	cc@example.com		Yes		Example Property C - Electricity
CA	93010			Casey Charles	805-222-2222	cc@example.com		Yes		Example Property C - Natural Gas
CA	93010			Casey Charles	805-222-2222	cc@example.com		Yes		Example Property C - Water
DE	19901		14	Diana Delano	302-333-3333	dd@example.com	1	Yes		Example Property D - Electricity
DE	19901		15	Diana Delano	302-333-3333	dd@example.com	1	Yes		Example Property D - Electricity
DE	19901		15	Diana Delano	302-333-3333	dd@example.com	600	Yes		Example Property D - Natural Gas
DE	19901		15	Diana Delano	302-333-3333	dd@example.com	600	Yes		Example Property D - Water

Portfolio Manager Meters Tab

	A	B	C	D	E	F	G	H	I
	Include in Next Portfolio Manager Upload?	Portfolio Manager Meter Name	Property Name	Meter Type - Basic	Meter Type - Detailed	Unit of Measure	Estimation?	Bulk or Metered?	Description (Required if Detailed Meter Type is "Other")
1									
2	Not Yet	Example Property A - Electricity	Example Property A	Electricity	Electricity - Grid Purchase	kWh (thousand Watt-hours)	No	Metered	Example Description
3	Not Yet	Example Property A - Natural Gas	Example Property A	Natural Gas	Natural Gas	therms	No	Metered	Example Description
4	Not Yet	Example Property A - Water	Example Property A	Water	Potable Indoor	Gallons	No	Metered	Example Description
5	Not Yet	Example Property B - Electricity	Example Property B	Electricity	Electricity - Grid Purchase	kWh (thousand Watt-hours)	No	Metered	
6	Not Yet	Example Property B - Natural Gas	Example Property B	Natural Gas	Natural Gas	therms	No	Metered	
7	Not Yet	Example Property B - Water	Example Property B	Water	Potable Indoor	Gallons	No	Metered	
8	Not Yet	Example Property C - Electricity	Example Property C	Electricity	Electricity - Grid Purchase	kWh (thousand Watt-hours)	No	Metered	
9	Not Yet	Example Property C - Natural Gas	Example Property C	Natural Gas	Natural Gas	therms	No	Metered	
10	Not Yet	Example Property B - Water	Example Property B	Water	Potable Indoor	Gallons	No	Metered	
11	Not Yet	Example Property D - Electricity	Example Property D	Electricity	Electricity - Grid Purchase	kWh (thousand Watt-hours)	Yes	Metered	
12	Not Yet	Example Property D - Natural Gas	Example Property D	Natural Gas	Natural Gas	therms	Yes	Metered	
13	Not Yet	Example Property D - Water	Example Property D	Water	Potable Indoor	Gallons	Yes	Metered	
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									



Upload to Portfolio Manager Tab

Multifamily Utility Benchmarking Plan (beta version 1.0)

Portfolio Manager Spreadsheet Uploads

Follow the instructions below if you would like to generate pre-formatted spreadsheets using the data collected in this Plan, which can be uploaded directly to your organization's Portfolio Manager account.

Always thoroughly review your data for accuracy before and after uploading it to Portfolio Manager; your data is your responsibility.

Note that it may take some time to generate uploads for large portfolios, especially for "Add Meters" uploads with several hundred to several thousand meters.

To Add New Properties in Portfolio Manager:

To generate a spreadsheet to add properties to your organization's Portfolio Manager account:

1. Select the properties you wish to upload from the list below (beginning on row 65 on this worksheet).

****Do not select properties that have already been created in your organization's Portfolio Manager account, or you will end up with duplicate properties in Portfolio Manager.****

2. Ensure all required fields are filled out on the Property Information worksheet for the properties you wish to add.
3. Access the [Portfolio Manager Spreadsheet Upload](#) web page and download the "Add Properties" template by clicking the link in the upper right corner (see image at right).
4. Save the downloaded Portfolio Manager template *in the same folder as this Plan on your computer*, with the name "Add_Properties_en".
5. Click the "Generate 'Add Properties' Spreadsheet Upload" button below. This will create a new "Add_Properties" spreadsheet with a time and date stamp reflecting when it was generated.
6. Carefully check the contents of the newly-created Add Properties spreadsheet to make sure all information is accurate.
7. Back on the Portfolio Manager Spreadsheet Upload web page, select "Add New Properties" in the "Type of Upload" drop-down menu. Click "Browse," select the newly-created Add Properties spreadsheet, and click "Upload."

Generate "Add Properties"
Spreadsheet Upload

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

To Update Use Details in Portfolio Manager:

It is recommended that you take this step **immediately** after successfully uploading an Add Properties spreadsheet, to avoid intermediary edits in Portfolio Manager that could cause issues.

To generate a spreadsheet to update use details for existing properties within your organization's Portfolio Manager account:

1. Ensure all required fields are filled out on the Property Information worksheet for the properties you wish to update.
2. Access the [Portfolio Manager Spreadsheet Upload](#) web page and click "Create an Upload Template" (see image at right).
3. Select the radio button for "Update Use Details for Existing Properties."
4. Select the properties you wish to update.
5. When prompted to "Select Detailed Information to Include", **check only "Multifamily Housing."** (Parking and Swimming Pool details should have been added during the "Add Properties" step above.)
6. Leave "1" as the answer to "How many updates for this type of use?" and click "Create & Download Template."
7. Save the downloaded Portfolio Manager spreadsheet template *in the same folder as this Plan on your computer*, with the name "Update_Use_Details_en".
8. Click the "Generate 'Update Use Details' Spreadsheet Upload" button below. If any error messages appear, resolve the errors and try again.
9. Carefully check the contents of the newly-created Update Use Details spreadsheet to make sure all information is accurate.
10. Back on the Portfolio Manager Spreadsheet Upload web page, select "Update Use Details for Existing Properties" in the "Type of Upload" drop-down menu. Click "Browse," select the newly-created Update Use Details spreadsheet, and click "Upload."
11. Once use details have been successfully uploaded, select "Yes" under "Have Use Details been Updated?" in the table beginning on row 65 below (see tool tip in that column header.)

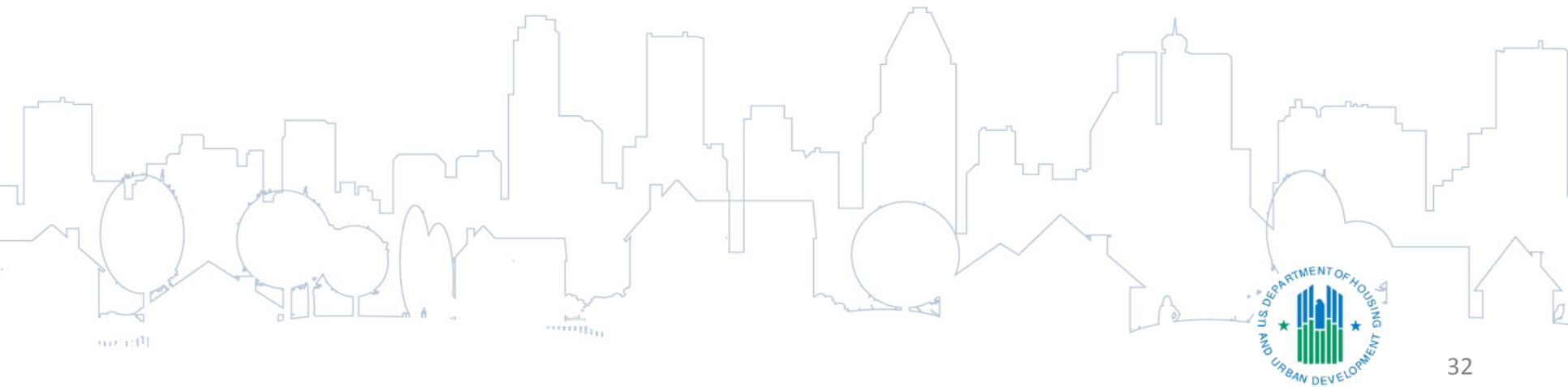
Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

Important: Use details in Portfolio Manager cannot be corrected/changed with these spreadsheet uploads; only updated with new information dated later than the last update date for that use detail in Portfolio Manager. Therefore, all use details updated with these spreadsheet uploads will retain a default value effective for 1 day in Portfolio Manager. For example, if you add Property A to Portfolio Manager using an Add Properties upload, it will automatically be populated with default values for number of units, number of bedrooms, etc., effective January 1 of the year the property was constructed. When you upload the "Update Use Details" spreadsheet with actual values, the updated values will have an effective date of January 2 of the same year. The original default value will remain in place for the 1-day period of January 1 until changed manually in Portfolio Manager. In the current version of this tool, any use detail effective dates other than 1/1/xxxx (as part of default Add Properties upload)

What's Next?



Upcoming Webinars and Events

- **April 27**
Webinar 3: Collecting the Data for Utility Benchmarking of Multifamily Properties
- **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

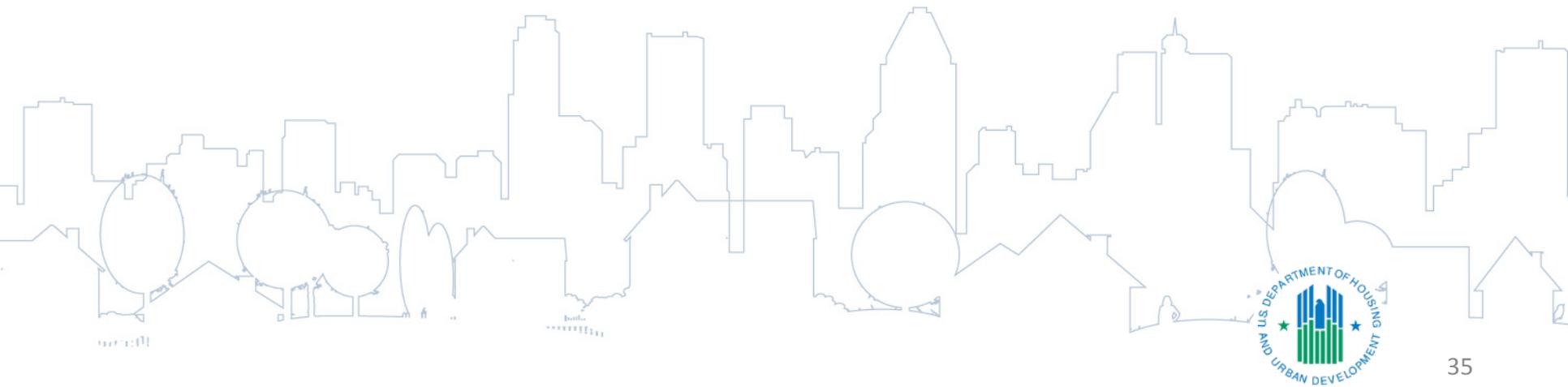


Be Sure to Register!

- 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](#)
- [U.S. DOE Guidance: Designing a Benchmarking Plan](#)
- [Institute for Market Transformation: Information on Local Benchmarking Policies](#)
- [U.S. EPA Guidance: How to Benchmark a Campus in Portfolio Manager](#)
- [U.S. EPA Map and Fact Sheet: Utilities Providing Access to Whole-Building Energy Consumption Data](#)
- [HUD Multifamily Utility Data Collection Database](#)



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Thank you, and we'll see you
next week for Webinar 3!

