

HUD Multifamily Utility Benchmarking Webinar Series

Webinar 1: Introduction to Multifamily Utility Benchmarking and HUD's New Toolkit

April 13, 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”



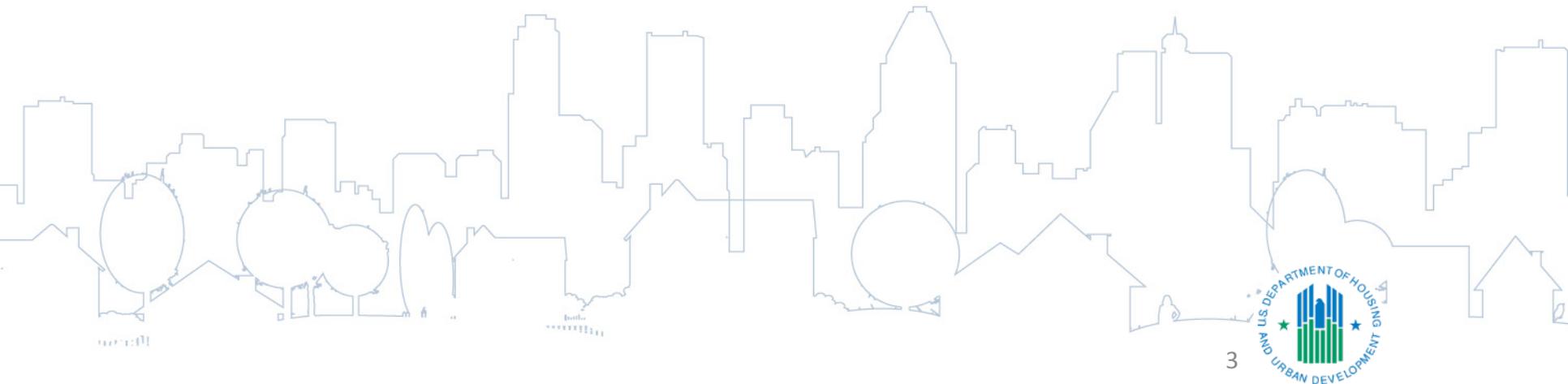
Presenters

Host

- Julia Hustwit,
US Department of Housing and Urban Development

Speakers

- Scott Ledford, ICF
- Blakely Jarrett, ICF



Today's Webinar

- First 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](#)

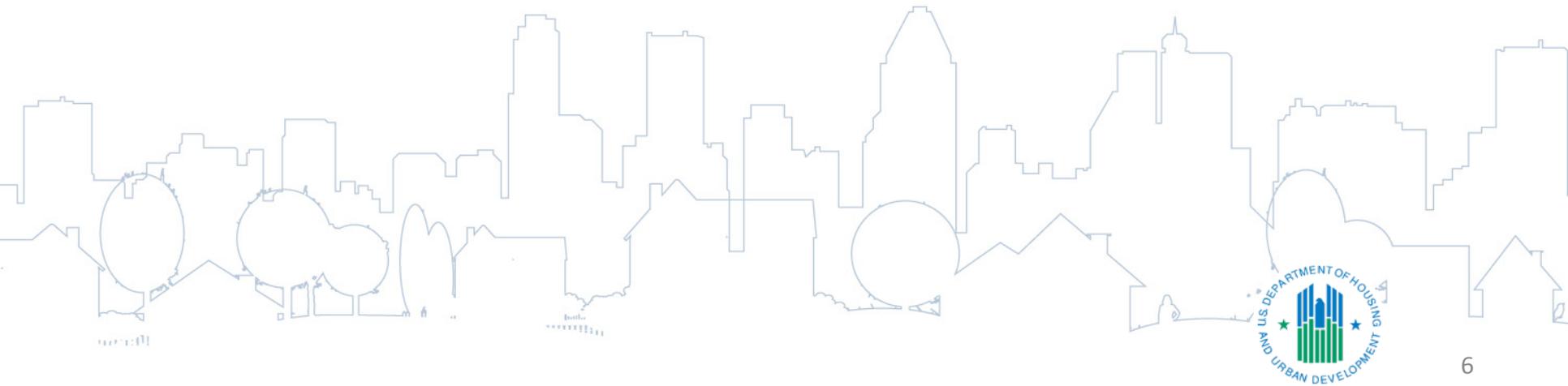


Learning Objectives

- In this session, you will:
 - Learn about the benefits of utility benchmarking, including various drivers for performing utility benchmarking at multifamily properties
 - Understand how your organization can get started with utility benchmarking, with the help of new HUD resources
 - Receive a guided overview of the new HUD Multifamily Utility Benchmarking Toolkit
 - Preview upcoming webinars that will dive deeper into specific utility benchmarking methods and related elements of HUD's new Toolkit



Utility Benchmarking Overview



What is Utility Benchmarking?

- The act of tracking, analyzing, and reporting energy and water consumption and costs for a property or portfolio of properties, so that properties can be compared against themselves over time, and/or against others
- Considered a fundamental asset management practice

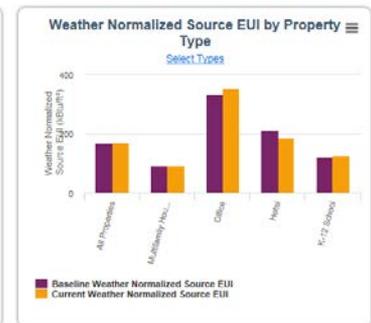
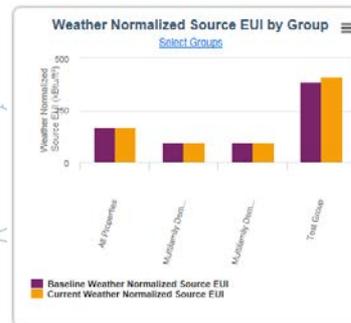
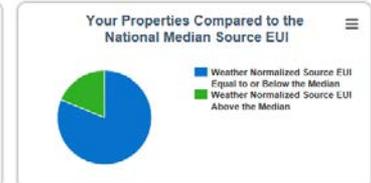
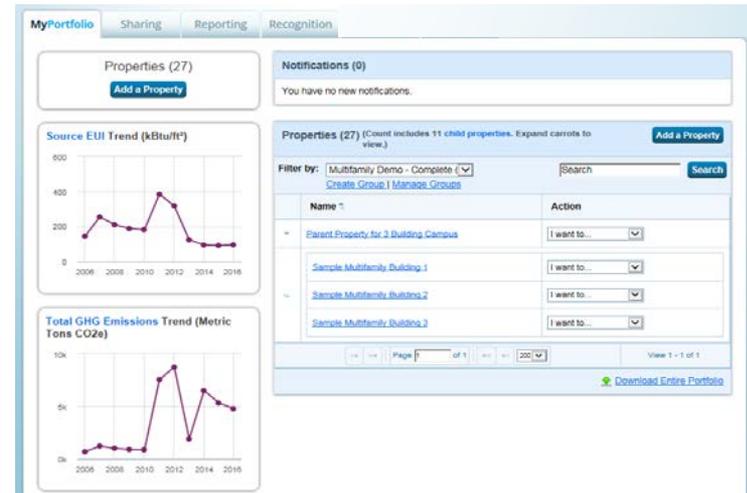
“You can’t manage what you don’t measure!”

- An activity that brings benefits to owners, tenants, funding providers, governing agencies, and the general public



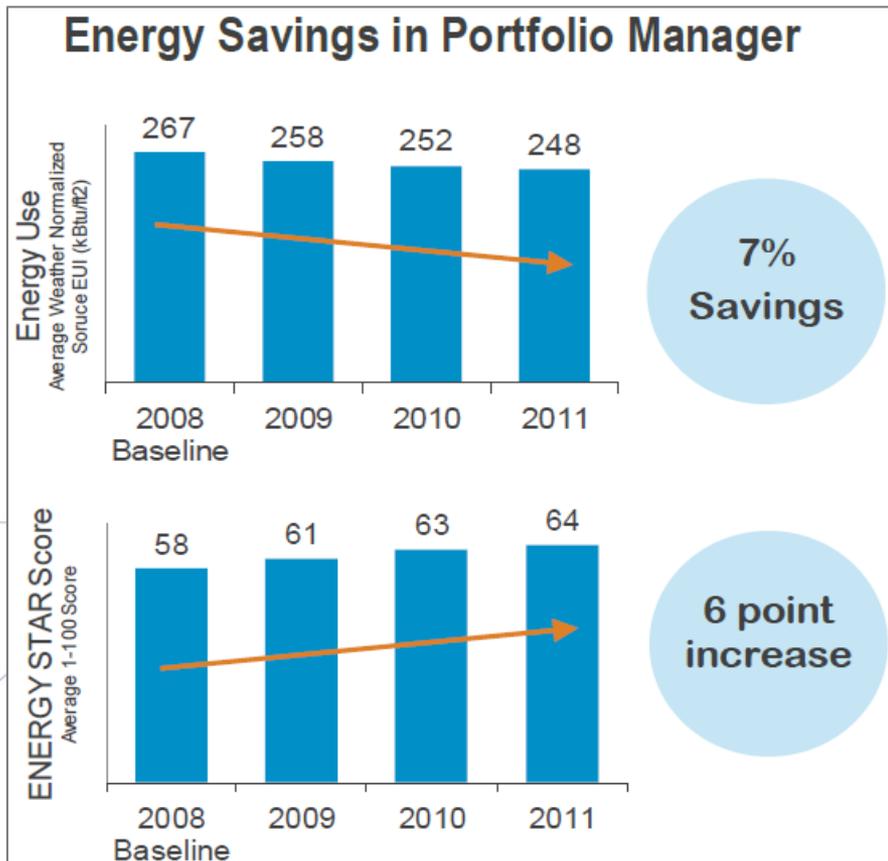
What Can You Do With Utility Benchmarking Results?

- Understand how property/portfolio energy and water performance changes over time
- Identify top performing properties in a portfolio, as well as underperformers
- Compare property/portfolio performance against others
- Prioritize energy and water improvement efforts and investments to maximize impact
- Assess the effectiveness of investments made to improve energy and water performance



What are the Benefits of Utility Benchmarking? (Little Picture)

- Reduce operating costs for owners, tenants



- Equip property owners with information needed to make strategic decisions regarding capital investments, operations and maintenance, and future budgets
- Stabilize assets
- Maximize return on investments
- Improve services to tenants

What are the Benefits of Utility Benchmarking? (Big Picture)

- Reduce waste of money and natural resources

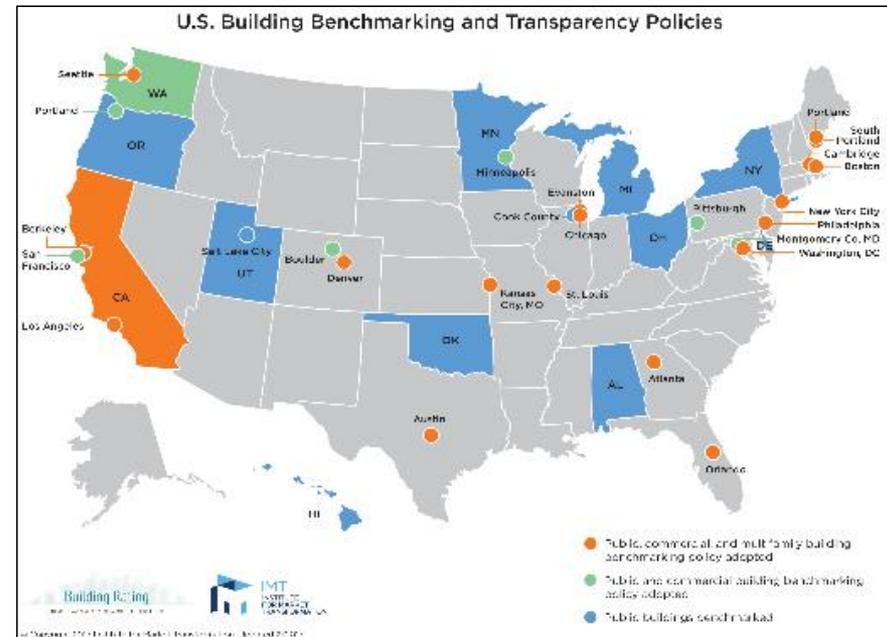
Did You Know?

- Energy waste by U.S. households and businesses is valued at \$130 Billion per year.
 - As a rule of thumb, building energy use can be cut by at least 20% through cost-effective improvements.
-
- Increase energy independence and combat climate change
 - Preserve affordable housing and save taxpayer dollars
 - Support government research and development of better policies, programs, and incentives
 - Support academic research



What is Driving Utility Benchmarking Across the Country?

- Widespread recognition of benchmarking as a best practice and a way to eliminate operational waste (money, natural resources)
- Growing number of state and local jurisdictions requiring benchmarking and disclosure of energy and water performance
- Some utilities requiring benchmarking as part of participation in incentive programs



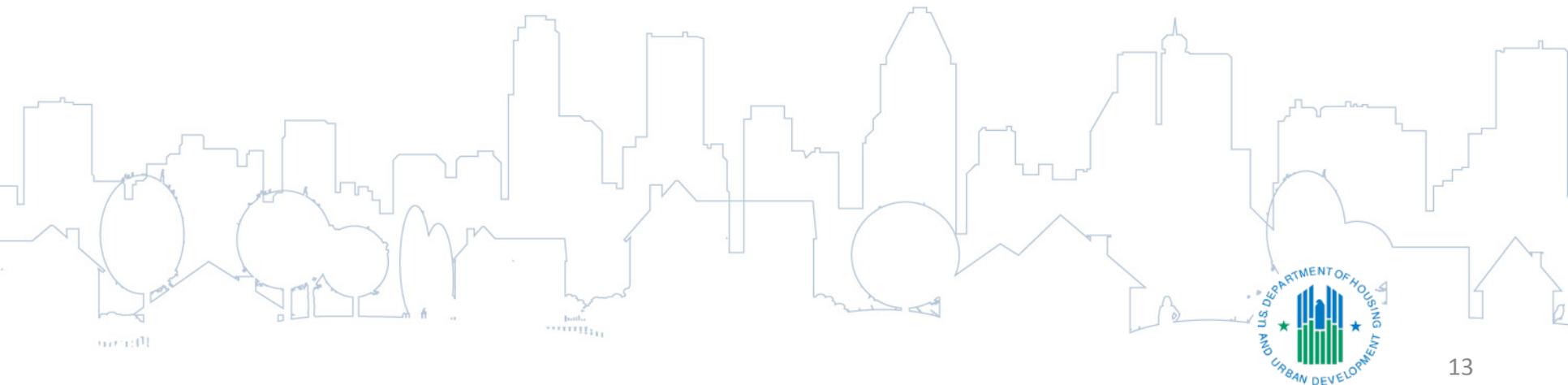
What is Driving Utility Benchmarking Across the Country? (cont'd.)

- HUD voluntary initiatives
 - Better Buildings Challenge (BBC)
 - Green Mortgage Insurance Premium (MIP) Reduction
- Existing and proposed HUD requirements
 - Webinar 6 in this series

Regardless of program involvement, HUD strongly encourages all housing providers to practice utility benchmarking as part of their basic asset management activities.

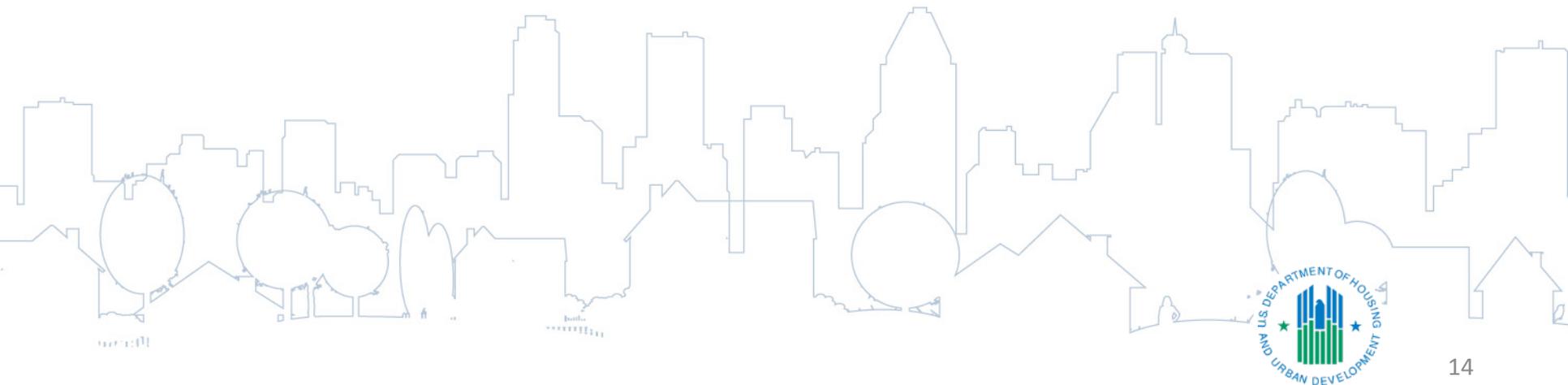


How Can My Organization Get Started With Utility Benchmarking?



Review Available HUD Resources

- Make sure you are registered for all of the webinars in this series
- Start reviewing the HUD Multifamily Utility Benchmarking Toolkit, and check back for updates



Understand the Utility Benchmarking Process at a High Level

- Develop a sense of the major steps in the utility benchmarking process
 - Prepare Your Approach
 - Collect Utility Data
 - Use Benchmarking Software
 - Enter the Data
 - Share the Results
 - Make Informed Decisions
- Begin assessing the resources that you prefer to use for each of these steps
 - In-house staff
 - Summer interns
 - Third-party consultants or service providers



Begin to Catalog Your Portfolio

- Start to record your portfolio's characteristics:
 - Number of properties
 - Number of buildings per property
 - Number and type of utility meters at each property
- Locate resources already complete, such as HUD-52722 submissions and Utility Allowance Schedules
- Webinar 2 will provide more guidance on ways to gather and maintain information – including a new HUD tool that can help you organize and keep track of it all!



Introduce Yourself to Portfolio Manager[®]

- ENERGY STAR[®] [Portfolio Manager[®]](#) is a free, web-based software tool for utility benchmarking
- Currently used to benchmark more than 450,000 properties across the U.S.
- All properties can use Portfolio Manager to measure and track energy and water use intensity (consumption per sq. ft.), greenhouse gas emissions, and a range of calculated performance metrics

The screenshot displays the ENERGY STAR Portfolio Manager interface for a property. The header includes the ENERGY STAR logo and the text "ENERGY STAR Portfolio Manager[®]". Below the header, there are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition".

The main content area is titled "Parent Property for 3 Building Campus" and includes the address "123 Main Street, Durham, NC 27701" and "Portfolio Manager Property ID: 5831094". A "Not eligible to apply for ENERGY STAR Certification" badge is visible. The "ENERGY STAR Score (1-100)" is shown as "Current Score: 69" and "Baseline Score: 73".

The interface is divided into several sections:

- Notifications (0):** A message stating "You have no new notifications."
- Property Profile (To be deleted Fall 2017):** A message stating "You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo." A "Create Profile" link is provided.
- Source EUI Trend (kBtu/ft²):** A line graph showing Source EUI from 2006 to 2016. The y-axis ranges from 0 to 150. Data points are shown for 2014 and 2015, both at approximately 92.7.
- Total GHG Emissions Trend (Metric Tons CO₂e):** A line graph showing Total GHG Emissions from 2006 to 2016. The y-axis ranges from 0 to 1500. Data points are shown for 2014 and 2015, both at approximately 1,172.4.
- Metrics Summary:** A table comparing metrics for Dec 2014 (Energy Baseline) and Dec 2016 (Energy Current), along with a Change column.

Metric	Dec 2014 (Energy Baseline)	Dec 2016 (Energy Current)	Change
ENERGY STAR score (1-100)	73	69	-4(-5.5%)
Source EUI (kBtu/ft ²)	92.7	96.0	3.3(3.6%)
Site EUI (kBtu/ft ²)	35.4	38.5	1.1(3.1%)
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO ₂ e)	1,172.4	1,213.3	40.9 (3.5%)
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Below the metrics summary, there is a "Check for Possible Data Errors" section with a "Check for Possible Errors" button. At the bottom, there is a section for "Individual Buildings on this Property (3)" with a table listing buildings and their details.

Name	Use	Gross Floor Area (Sq. Ft.)	Action
Sample Multifamily Building 1	Multifamily Housing	100000 Sq. Ft.	I want to...
Sample Multifamily Building 2	Multifamily Housing	100000 Sq. Ft.	I want to...
Sample Multifamily Building 3	Multifamily Housing	100000 Sq. Ft.	I want to...

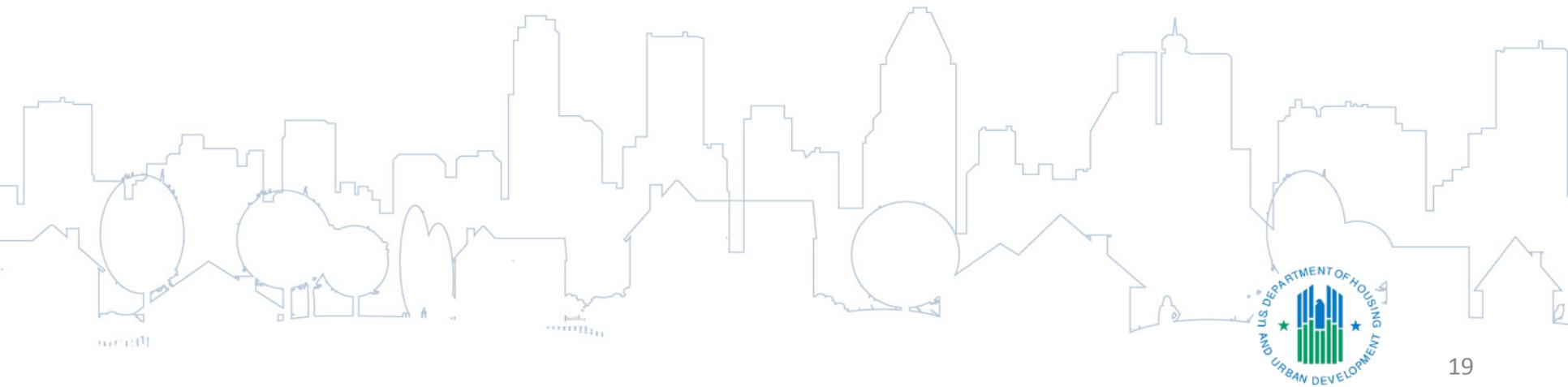
A note at the bottom states: "It is important that you keep your Property Use Details updated at both the parent and child levels of your campus so that your ENERGY STAR score and other metrics are accurate. [Learn more about keeping Use Details up to date.](#)"

Introduce Yourself to Portfolio Manager[®] (cont'd.)

- Portfolio Manager offers advanced reporting functionality to help track and assess performance of properties and portfolios
- The ENERGY STAR 1-100 score is available for multifamily properties of 20 units or more
 - Allows properties to be compared to each other
 - Properties scoring 75 or above eligible for ENERGY STAR Certification
- Many third-party providers are sending data through to Portfolio Manager on behalf of property owners – offering another pathway to facilitate benchmarking
- Extensive training resources are available at <https://www.energystar.gov/buildings/training>



HUD's New Multifamily Utility Benchmarking Toolkit



HUD Exchange Utility Benchmarking Website

www.hudexchange.info/programs/utility-benchmarking/

Resources and assistance to support HUD's community partners



HUD EXCHANGE
Secretary Ben Carson

NEED HOUSING ASSISTANCE?

Email Updates

Log In

Programs ▾

Resources ▾

Trainings

Program Support ▾

Grantees ▾

News



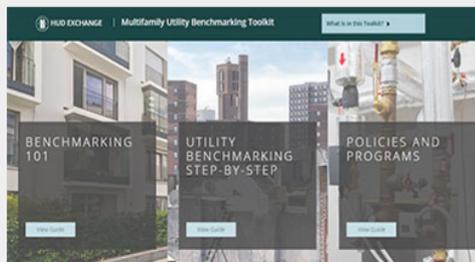
[Home](#) > [Programs](#) > [Utility Benchmarking](#)

Utility Benchmarking

Utility benchmarking is a fundamental asset management practice, consisting of tracking, analyzing, and reporting the utility consumption and costs associated with a property or portfolio of properties. It allows multifamily property owners, as well as associated funding providers and governing agencies, to gain insight into the energy and water performance of properties, the potential for improvement in those properties, changes in performance over time, and the effectiveness of investments made to improve performance.

HUD strongly encourages the practice of utility benchmarking by the companies, organizations, and agencies that own and manage the nation's housing stock. Please visit this site regularly to find news and announcements, events and training, resources and tools, and policies and incentives to support your efforts.

Now Available: HUD's Multifamily Utility Benchmarking Toolkit



This comprehensive guide to utility benchmarking for the multifamily sector is organized into three sections:

- **Benchmarking 101**
- **Utility Benchmarking Step-by-Step**
- **Policies and Programs**

It includes links to key resources and requirements, tools and reports, case studies, and FAQs.

Events and Training

HUD

[Multifamily Utility Benchmarking Webinar Series: April - June 2017](#)

[View All Upcoming and Archived Training](#)

ENERGY STAR® Portfolio Manager®

[Portfolio Manager Upcoming Training](#)

[Portfolio Manager Training Archive](#)

Toolkit Landing Page

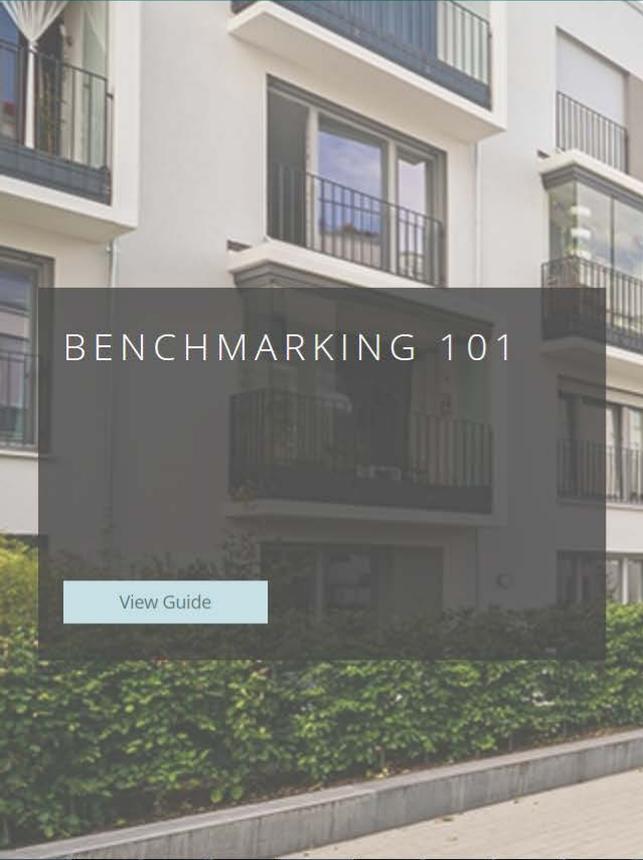
www.hudexchange.info/programs/utility-benchmarking/toolkit/



HUD EXCHANGE

Multifamily Utility Benchmarking Toolkit

What is in this Toolkit? ▶



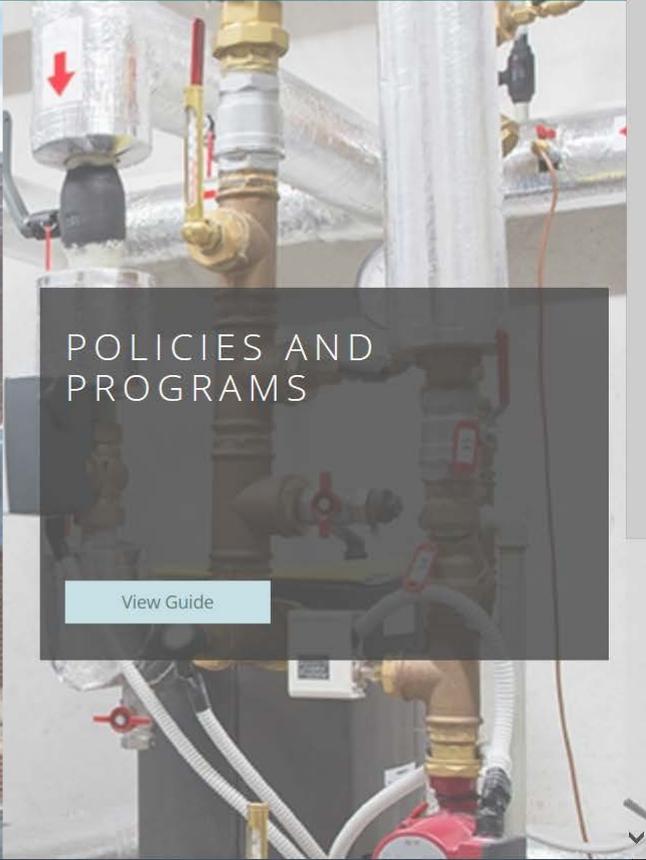
BENCHMARKING 101

View Guide



UTILITY
BENCHMARKING
STEP-BY-STEP

View Guide



POLICIES AND
PROGRAMS

View Guide

A PDF Version Will Be Posted



HUD EXCHANGE

Multifamily Utility Benchmarking Toolkit

What is in this Toolkit?



close

What is in this Toolkit?

This toolkit is a comprehensive guide to utility benchmarking for the multifamily sector organized into three sections.

Benchmarking 101 describes the benefits of tracking utility data and explains how to begin the process of utility benchmarking, including an introduction to Portfolio Manager and several case studies.

Utility Benchmarking Step-by-Step outlines a six-step approach for developing a strategy that can work for your organization, collecting and using utility data, and targeting energy- and water-efficiency improvements.

Policies and Programs summarizes benchmarking requirements for various HUD programs, opportunities for financial assistance, and HUD programs that can support property owners toward green retrofits.

Within the toolkit, there are links to key resources and requirements, tools and reports, case studies, and frequently asked questions.

[Download a PDF of the Toolkit](#)

BENCHM

View Guide

View Guide

View Guide

Benchmarking 101

www.hudexchange.info/programs/utility-benchmarking/toolkit/benchmarking-101



Multifamily Utility Benchmarking Toolkit

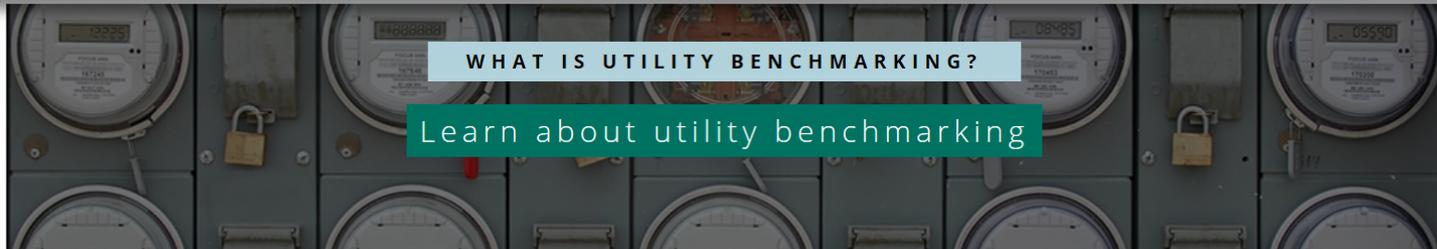
BENCHMARKING 101

WHAT IS UTILITY BENCHMARKING?

WHAT ARE THE BENEFITS?

WHAT IS PORTFOLIO MANAGER?

CASE STUDIES



What is utility benchmarking?

Utility benchmarking is a fundamental asset management practice, consisting of tracking, analyzing, and reporting the consumption and costs associated with a property or portfolio of properties. It allows multifamily property owners, as well as associated funding providers and governing agencies, to gain insight into the energy and water performance of properties, the potential for improvement in those properties, changes in performance over time, and the effectiveness of investments made to improve performance.

Armed with this knowledge, property owners, funding providers, and governing agencies can make better decisions about the management of our nation's building stock, reduce operating costs, increase energy independence, and combat climate change. For federally-supported housing, utility benchmarking serves to preserve affordable housing, protect tenant welfare, target investments, and meet environmental goals.

How can my organization get started?

Although housing providers are free to approach utility benchmarking as they choose, the [step-by-step process](#) outlined in this online toolkit was developed to demystify the process and promote best practices. It's important for your organization to understand from the beginning that utility benchmarking of multifamily properties involves:

Utility Benchmarking Step-By-Step

www.hudexchange.info/programs/utility-benchmarking/toolkit/utility-benchmarking-step-by-step/



Multifamily Utility Benchmarking Toolkit

UTILITY
BENCHMARKING
STEP-BY-STEP

STEP 1:
PREPARE YOUR
APPROACH

STEP 2:
COLLECT UTILITY
DATA

STEP 3:
USE
BENCHMARKING
SOFTWARE

STEP 4:
ENTER THE DATA

STEP 5:
SHARE THE
RESULTS

STEP 6:
MAKE INFORMED
DECISIONS

FAQS



In order to benchmark the energy and water performance of your organization's properties for the first time, your organization will need to do some preparation, including cataloging its portfolio of properties, determining how best to collect and input utility data, and making decisions about whether to meet minimum standards or seek deeper insight into the portfolio. Housing providers have found it beneficial to document this information centrally, update it regularly, and refer back to it frequently. By keeping information organized, the initial and successive years of utility benchmarking will be as easy as following a recipe.

HUD's [Multifamily Utility Benchmarking Plan Template](#) is a spreadsheet-based tool designed to help your organization gather necessary information and document decisions. HUD does not require that your organization use this template, but keep in mind that any utility benchmarking plan should give your organization a single document to refer back to in the future, ensure consistency and continuity, and help build capacity in your organization for the future.

Additional guidance on developing a utility benchmarking plan can be found in [Designing a Benchmarking Plan](#) from the U.S. Department of Energy (DOE), though this resource is geared towards the commercial buildings sector. Whether your organization chooses to use these existing resources or develop a utility benchmarking plan from scratch, the following items should be considered and addressed.

Policies and Programs

www.hudexchange.info/programs/utility-benchmarking/toolkit/policies-and-programs/



Multifamily Utility Benchmarking Toolkit

POLICIES AND PROGRAMS

HUD BENCHMARKING REQUIREMENTS

FINANCIAL ASSISTANCE FOR UTILITY BENCHMARKING

GREEN RETROFIT OPPORTUNITIES



HUD strongly encourages utility benchmarking and requires it in some programs

HUD recognizes that utility benchmarking is important for all housing providers because it allows them to:

- Track properties' energy and water performance;
- Detect malfunctioning equipment and billing errors;
- Prioritize operational and capital improvements;
- Verify the return on those investments; and
- Plan for future budget needs.

HUD has issued Notices of Proposed Information Collection that, if enacted, would require the collection of utility benchmarking information from housing providers supported by the Office of

Related Resource

Former OMB Director and HUD Secretary, Shaun Donovan, Announces HUD's Utility Benchmarking Initiatives

At Greenbuild 2016, Director Donovan highlighted the Administration's efforts to make the places we live and work for all Americans. Through HUD's focus on high-performance buildings, including our utility benchmarking initiatives, homes across the country are becoming more efficient,

Related Resources Highlighted Throughout

BENCHMARKING 101

WHAT IS UTILITY
BENCHMARKING?

WHAT ARE
THE BENEFITS?

WHAT IS PORTFOLIO
MANAGER?

CASE STUDIES

What are the benefits of utility benchmarking?

Just the act of utility benchmarking itself creates a variety of benefits to property owners, tenants, and the public. Property owners who integrate utility benchmarking into their asset management approach often see significant improvements in property performance. Utility data tracking can help property owners discover billing errors and malfunctioning equipment, which, once corrected, can result in immediate financial savings. Knowledge gained from utility benchmarking can inform retrofit planning and help verify savings in individual buildings, multi-building properties, and portfolios of properties.

Utility benchmarking can also lead to improvements in property operations and operating costs, which can help protect tenants' comfort and finances as well. The energy and water performance metrics reported through utility benchmarking programs also help funding providers and governing agencies create better incentives for energy- and water-efficiency improvements, target investments more strategically, and track progress towards mission-related goals. When made available to the public, anonymized data from utility benchmarking programs also supports academic research and enhances public awareness.

Does HUD require utility benchmarking?

HUD has issued Notices of Proposed Information Collection that, if enacted, would require the collection of utility benchmarking information from housing providers supported by the Office of Multifamily Housing's assisted and insured housing programs and the Office of Public Housing's public housing program, with certain exceptions.

HUD also hosts certain voluntary initiatives, like the Better Buildings Challenge (BBC) or the Green Mortgage Insurance Premium (MIP) Reduction, which require participants to conduct utility benchmarking and share the results.

Regardless of program involvement, HUD strongly encourages all housing providers to practice utility benchmarking as part of their basic asset management activities.

Related Resources

- [Institute for Market Transformation's Guide to Building Energy Performance Profiles](#)
- [BuildingRating.org, an online information exchange on building rating policies and programs](#)
- [U.S. Environmental Protection Agency's report, Benchmarking and Energy Savings](#)
- [Institute for Market Transformation's report, The Benefits of Benchmarking Building Performance](#)

Links to Key Examples

UTILITY BENCHMARKING
STEP-BY-STEP

STEP 1:
PREPARE YOUR
APPROACH

STEP 2:
COLLECT UTILITY DATA

STEP 3:
USE BENCHMARKING
SOFTWARE

STEP 4:
ENTER THE DATA

STEP 5:
SHARE THE RESULTS

STEP 6:
MAKE INFORMED
DECISIONS

FAQS

Example Release Forms

The following are examples of release forms that have been used to facilitate the collection of tenant-paid utility data in certain areas. Note that the specific language of any release form your organization may develop should be reviewed and approved by the relevant utility provider before your organization begins the process of collecting tenant information and signatures.

[Energy Impact Illinois Multifamily Building Owner Utility Bill Release](#) - If tenant units are separately metered, each tenant (or the building owner for vacant units) must complete the multi-family building tenant release form.

[SCE Customer Information Standardized Request Form](#) - Customers of this western utility provider can use this form to give authorization to a designated entity to receive service account information or act on their behalf to perform a variety of specific acts and functions, including "EPA benchmarking" and "requesting and receiving billing records, billing history, and all meter usage data used for bill calculations for [their] service account(s)."

[Centerpoint / EnergyScoreCards Minnesota Tenant Utility Information Authorization Form](#) - Authorizes the property owner and partner organizations to collect historical and current utility consumption and spending information for tenant-paid utility accounts.

[HUD Secretary Open Letter to Utility Providers and Sample Release of Tenant Utility Information Form](#) - An open letter asking utility providers to support and participate in efforts to facilitate access to utility usage data for owners of multifamily residential buildings in HUD's portfolio, with a form designed as a standardized format to document a tenant's consent for the utility provider to release information to the housing provider and HUD.

Sampling Protocols for Tenant-Paid Utility Data (Method D)

The first step in sampling tenant-paid utility data is to identify how many units are necessary to sample in order to appropriately estimate utility consumption and cost for all of the units in the property. For use in its programs, HUD references two sampling protocols, summarized in the table below.

Housing providers should refer to the program requirements applicable to their specific properties to

Related Resources

Most housing providers supported by HUD's affordable housing programs already collect some individual tenant-paid utility data for the purposes of calculating utility allowances

Information on Financial and Technical Assistance

The Better Buildings Challenge (BBC): A voluntary incentive program that offers both financial and technical assistance for utility benchmarking and more

What is it?

The Better Buildings Challenge is a voluntary leadership initiative that asks property owners and managers to make a public commitment to energy and/or water efficiency. All BBC Partners are eligible to receive on-site or off-site technical assistance with utility benchmarking. BBC Partners that own or manage assisted housing are also eligible for a Management Add-On Fee incentive.

What is the financial/technical assistance?

BBC Partners may request technical assistance from their BBC Account Managers to gain support in overcoming obstacles towards their energy and/or water efficiency pledges, including utility benchmarking. HUD establishes a scope of work for the direct technical assistance project in cooperation with the BBC Partner and then hires contractors to provide on-site or off-site support.

Further, owners / managers of assisted housing that are members of the BBC may request up to \$4 per unit per month in the form of a Management Add-On Fee to support the effort associated with participating in the Better Buildings Challenge. This includes the practice of utility benchmarking.

To access this financial assistance, BBC Partners should request the Management Add-On Fee incentive from their local HUD Field Office. The Management Add-On Fee is paid to the owner manager through the property's operating account. The cumulative amount received may not exceed \$5,000 per year per property.

More information

- [Better Buildings Challenge program flyer \(coming soon\)](#)
- [Management Add-On Fee incentive flyer \(coming soon\)](#)
- [Better Buildings Challenge Multifamily Sector program website](#)

Mortgage Insurance Premium (MIP) Reduction: A voluntary incentive program that can pay for utility benchmarking and more

What is it?

Mortgage insurance encourages lenders to make loans to private sponsors or owners of rental housing by insuring the lender against losses incurred when borrowers default on their mortgages. If a housing provider owns and/or operates HUD-insured affordable multifamily rental property, the owner must pay a mortgage insurance premium, at a rate of 0.45% to 0.70% of the unpaid balance of the mortgage loan amount, along with the property's mortgage.

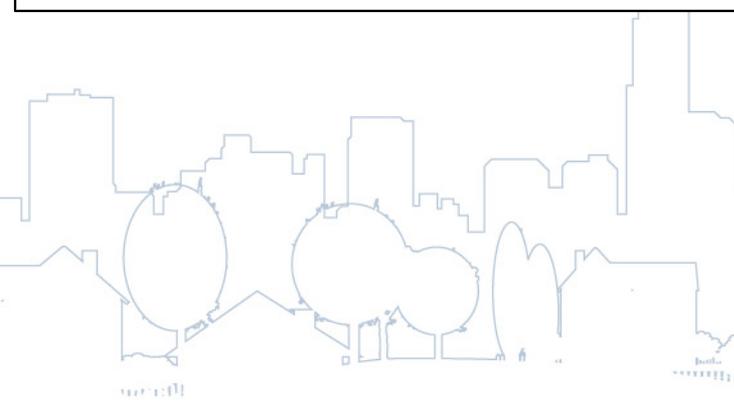
What is the financial/technical assistance?

In early 2016, HUD allowed for a lower multifamily insurance rate for green and energy-efficient housing to encourage owners to adopt higher standards for construction, rehabilitation, repairs, maintenance, and property operations. The lower rate incentivizes owners to implement measures that result in housing with greater energy and water performance, reduced operating costs, and improved indoor air quality and resident comfort.

Through this voluntary program, multifamily property owners may receive a 0.25% reduction in the MIP for properties that are committed to industry-recognized green building standards and achieve and maintain an Energy Star score of 75 or higher as evidenced by a report from Portfolio Manager. A housing provider may use the savings generated to cover costs associated with achieving these energy-efficiency targets, which can include the utility benchmarking efforts necessary to obtain an EUI, WUI, and ENERGY STAR score from Portfolio Manager.

More information

- [One page summary of MIP reduction program](#)
- [Final Notice, "Changes in Certain Multifamily Mortgage Insurance Premiums and Regulatory Waiver for the 542 \(c\) Risk-Sharing Program"](#)



Variety of Embedded Tools and Resources

Resources and assistance to support HUD's community partners

HUD EXCHANGE
Secretary Ben Carson

NEED HOUSING ASSISTANCE?

Programs ▾ Resources ▾ Trainings Program Support ▾

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 utility providers share data
- **Rubric:** Shows a scoring rubric used to develop a user-friendliness score for utility providers
- **Regional Benchmarking Mandates:** Outlines many of the local utility requirements

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

Utility Profiles

Select the state where a utility operates to view a profile describing the utility.

Alabama	Idaho
Alaska (N/A)	Illinois
American Samoa (N/A)	Indiana
Arizona	Iowa
Arkansas	Kansas

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 tip 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.)

Navigation tabs: **Benchmarking Plan** | Property Information | Utility Providers | Utility Meters | Portfolio Manager Meters | Upload to Portfolio Manager

Case Studies

BENCHMARKING 101

WHAT IS UTILITY
BENCHMARKING?

WHAT ARE
THE BENEFITS?

WHAT IS PORTFOLIO
MANAGER?

CASE STUDIES



Case Studies

The energy- and water-efficiency solutions featured below demonstrate how leading multifamily housing providers have successfully used utility benchmarking to implement a wide range of projects, realizing deep savings in individual properties and across broad portfolios. These and other case studies and resources are available on the U.S. Department of Energy's (DOE's) [Better Buildings Solution Center](#).

Showcase Projects Featuring Utility Benchmarking

Property owners share details on their energy- and water-efficiency projects, which apply cutting-edge measures to individual properties taking a multi-measure, whole-property approach to achieve performance improvements and cost savings. Showcase Projects are available for a variety of property types and sizes, and typically show savings of 20% or more.

- [City Gardens Apartments \(LINC Housing\)](#)
- [Colony Plaza Apartments \(POAH\)](#)
- [Boundary Village \(Mercy\)](#)

FAQs

UTILITY BENCHMARKING
STEP-BY-STEP

STEP 1:
PREPARE YOUR
APPROACH

STEP 2:
COLLECT UTILITY DATA

STEP 3:
USE BENCHMARKING
SOFTWARE

STEP 4:
ENTER THE DATA

STEP 5:
SHARE THE RESULTS

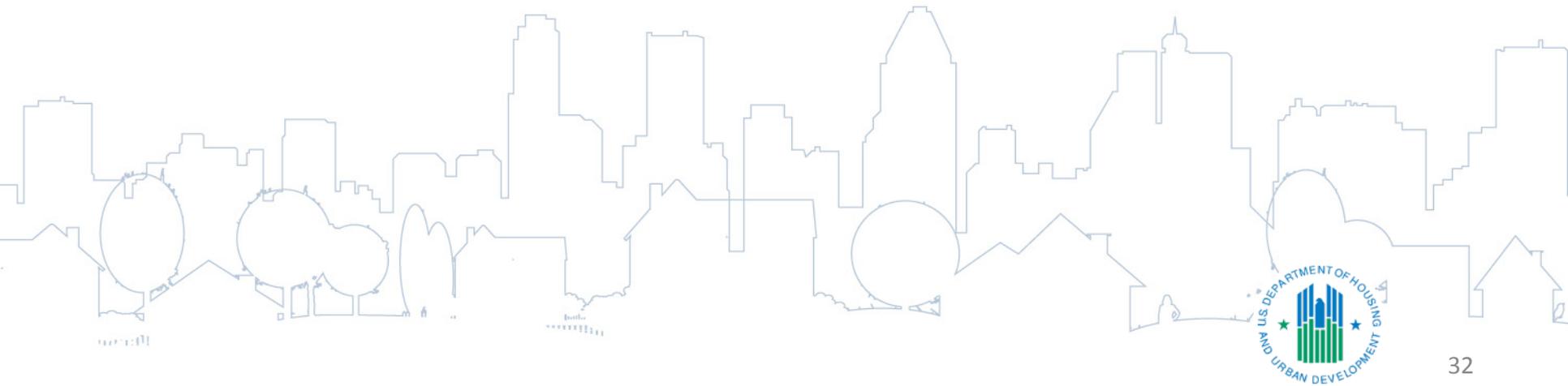
STEP 6:
MAKE INFORMED
DECISIONS

FAQS



What should I do if I have a utility meter that serves multiple properties?	+
What should I do if I have a utility meter that serves multiple buildings within a property?	+
What should I do if my property uses utilities that are not metered or that are not paid for on a consumption basis?	+
What should I do if I use on-site or community-based renewable energy technology?	+
What should I do if I purchase off-site renewable energy technology?	+

What's Next?



Upcoming Webinars and Events

- April 20
Webinar 2: Creating a Plan and Managing Data for Multifamily Benchmarking
- 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



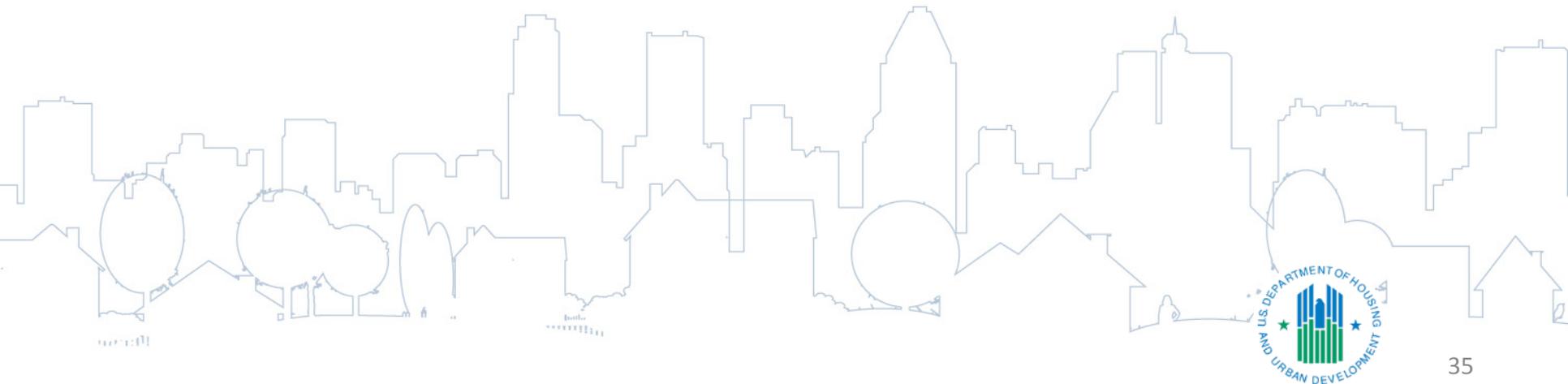
Upcoming Webinars and Events

- 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

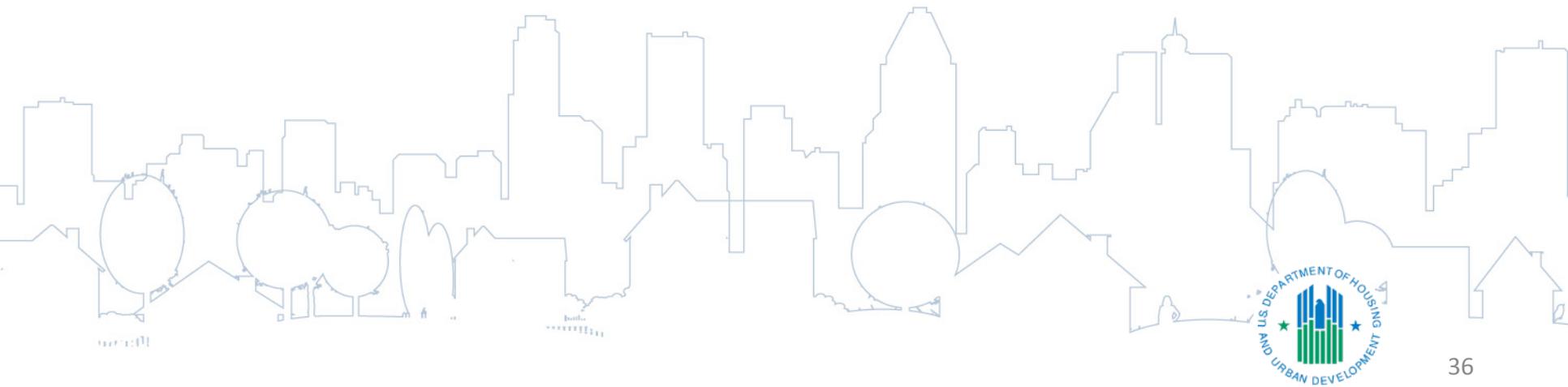


Be Sure to Register!

- 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. EPA Report: Benchmarking and Energy Savings](#)
- [Institute for Market Transformation Report: The Benefits of Benchmarking Building Performance](#)
- [Portfolio Manager Overview](#)
- [ENERGY STAR Training Resources](#)
- [ENERGY STAR FAQs](#)



Contact Information

- Julia Hustwit
 - Julia.B.Hustwit@hud.gov
- Scott Ledford
 - Scott.Ledford@icf.com
- Blakely Jarrett
 - Blakely.Jarrett@icf.com

Thank you, and we'll
see you next week for
Webinar 2!

