

HUD Multifamily Utility Benchmarking Webinar Series

Webinar 5: Sharing Multifamily Utility Benchmarking Results and Building on Success

May 11, 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”



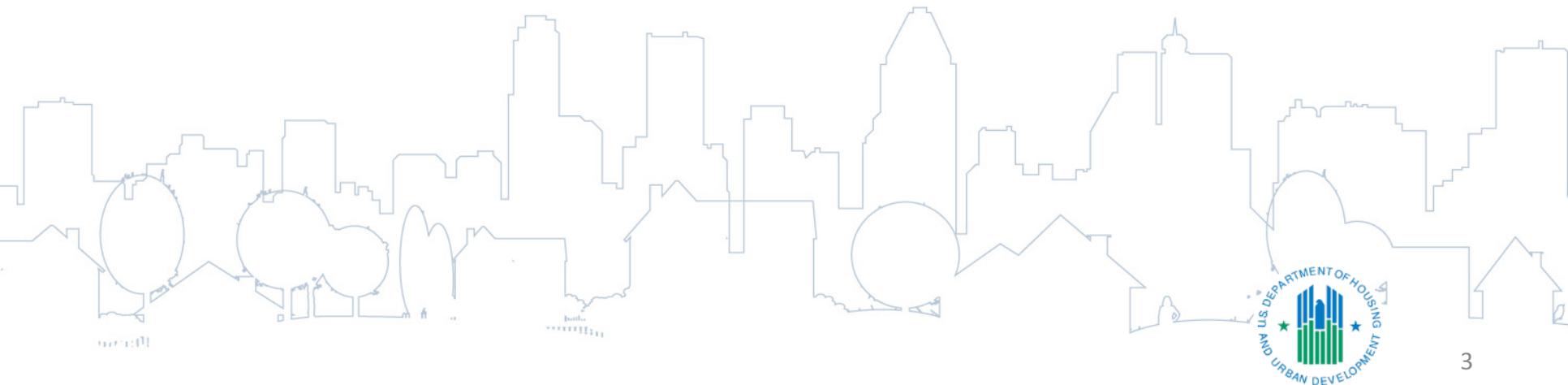
Presenters

Host

- Julia Hustwit,
US Department of Housing and Urban Development

Speakers

- Scott Ledford, ICF
- Andrew Schulte, ICF



Today's Webinar

- Fifth 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](#).

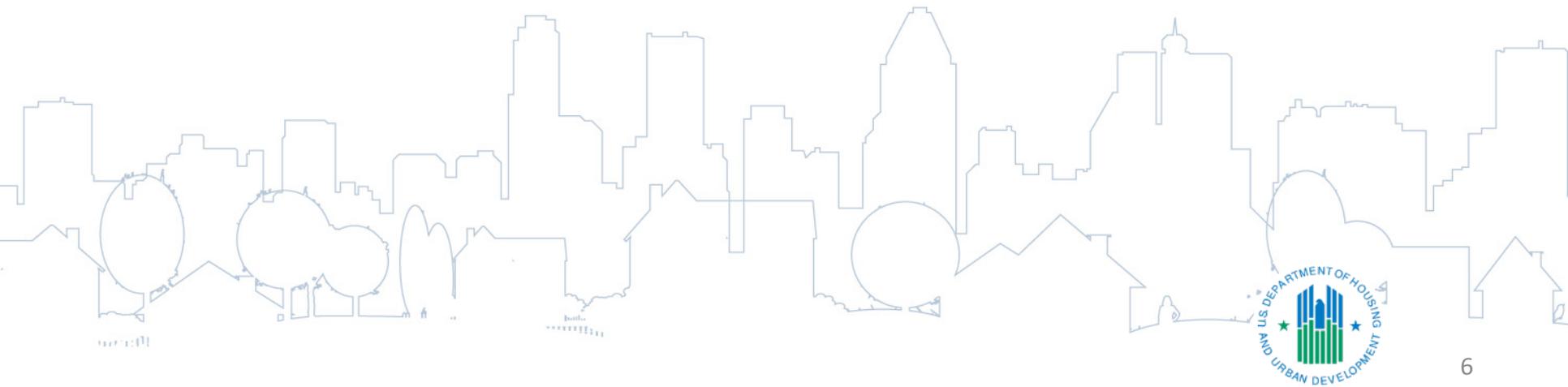


Learning Objectives

- In this session, you will:
 - Receive a demonstration of the ENERGY STAR® Portfolio Manager® Data Quality Checker;
 - Understand how to use Portfolio Manager functionality to share benchmarking results with internal audiences, and to report benchmarking results to external audiences;
 - Learn how to access, fill out, and submit HUD's new, customized utility benchmarking reporting template; and
 - Identify strategies and resources for translating benchmarking results into concrete next steps toward improving property performance.



Reviewing Data Quality



Why Review Data Quality?

- The results of utility benchmarking are only as good as the data entered into Portfolio Manager
- Double-checking data accuracy before reporting makes it less likely that you'll need to re-submit
- Portfolio Manager has a number of built-in features that can help you with data quality, including:
 - Metrics “Not Available” messages
 - Alert icons
 - Data Quality Checker
 - Inclusion of selected alerts in custom reports



Metrics “Not Available”

- Click on the link to see why some metrics are not being generated – and what you may be able to do
- Not always an error (metric may not be available for the property type)

Metrics Summary		Change Time Period	
Metric	Dec 2014 (Energy Baseline)	Dec 2016 (Other)	Change
ENERGY STAR score (1-100)	77	Not Available	N/A
Source EUI (kBtu/ft ²)	87.1	Not Available	N/A
Site EUI (kBtu/ft ²)	33.2	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO ₂ e)	390.8	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A



This metric cannot be calculated.

- 1) There is not 12 full months of meter data.

Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2016 - 12/31/2016).

- [Electric Grid Meter](#) (missing bills for 11/01/2016 - 01/01/2017)

What to do:

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.



Due to the inter-dependency of many of the metric calculations, this list of reasons may not be complete. Therefore, it is possible that after you fix one issue, you may encounter a new list of issues.

[Close Explanation](#)

Alert Icons

- Alerts will point out specific data issues that must be corrected
- Clicking on the exclamation point provides a specific explanation and suggestions for resolution

The screenshot shows a software interface with a navigation bar at the top containing tabs for Summary, Details (highlighted with a red circle), Energy, Water, Waste & Materials, Goals, and Design. Below the navigation bar, there are two main panels. The left panel, titled 'Basic Information', contains fields for 'Construction Status' (Test property that is one single building), 'Property GFA - Self-Reported' (100,000 Sq. Ft., with a red circle around the exclamation point icon), and 'Occupancy' (95%). The right panel, titled 'Property Uses and Use Details', features a 'View as Diagram' link and an 'Add Another Type of Use' button. Below these is a table with columns for Name, Property Use Type, and Gross Floor Area. The table contains one row: 'Building Use' with 'Multifamily Housing' and '110,000 sq. ft.'. Below the table, there are two summary rows: 'Property GFA (Buildings): 110,000 (sq. ft.)' (with a red circle around the exclamation point icon) and 'Property GFA (Parking): 0'. A large red arrow points from the exclamation point in the summary row to a pop-up window on the right. The pop-up window has a pink header 'Incomplete Data- Please Review' and a yellow warning icon. The text inside the pop-up reads: 'Gross Floor Area mismatch (entered vs. calculated). Problem: The total Gross Floor Area (GFA) that you entered for your property does not match the total calculated by EPA by adding the GFA for each Property Use. Self-Reported Property GFA: 100000 sq. ft. EPA-Calculated Property GFA: 110000 sq. ft. What to do: If the GFA for one of your Property Uses doesn't look right, it might be because it's time-weighted. If the EPA-Calculated GFA doesn't look right, it might be because you changed the GFA of one Property Use, but didn't change the GFA of another Property Use on the same day, in the same amount. See this FAQ. Correct your Self-Reported Property GFA or correct your Property Uses by clicking on their names from the Details tab. Learn more about these two types of GFA.' A 'Close Explanation' button is at the bottom right of the pop-up.

Summary | **! Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information

Construction Status:
Test property that is one single building

! Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Property Uses and Use Details

[View as Diagram](#) | Add Another Type of Use

Name	Property Use Type	Gross Floor Area
▶ Building Use	Multifamily Housing	110,000 sq. ft.

! Property GFA (Buildings): 110,000 (sq. ft.)

Property GFA (Parking): 0

Incomplete Data- Please Review

! Gross Floor Area mismatch (entered vs. calculated).

Problem: The total **Gross Floor Area (GFA)** that you entered for your property does not match the total calculated by EPA by adding the GFA for each Property Use.

- **Self-Reported Property GFA:** 100000 sq. ft.
- **EPA-Calculated Property GFA:** 110000 sq. ft.

What to do:

- If the GFA for one of your Property Uses doesn't look right, it might be because it's **time-weighted**.
- If the EPA-Calculated GFA doesn't look right, it might be because you changed the GFA of one Property Use, but didn't change the GFA of another Property Use on the same day, in the same amount. [See this FAQ](#).
- [Correct your Self-Reported Property GFA](#) or correct your Property Uses by clicking on their names from the **Details** tab. [Learn more about these two types of GFA](#).

Close Explanation

Data Quality Checker

Check for Possible Data Errors

Run a check for any 12-month time period to see if there are any possible errors found with your data.

Check for Possible Errors



Data Quality Checker for [Sample Multifamily Building 1](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a [Metric Year](#)). Select a [Year Ending Date](#) and click "run checker" to see possible data issues.

Year Ending:

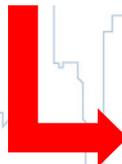
Dec 31 2016

Run Checker

About Timeframes

The Data Quality Checker needs one full calendar year of [Property Use Details](#) and [meter](#) information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

Cancel



There is not 12 full months of meter data.

Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2016 - 12/31/2016).

- [Electric Grid Meter](#) (missing bills for 11/01/2016 - 01/01/2017)

What to do:

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

Property has no water meters.

There are no water meters entered for this property. In order to track water use and receive metrics, you must create a water meter.

What to do:

- [Create a meter](#) and follow the steps to enter your water bills. Make sure you select the meter(s) that should be included in your performance metrics.

Gross Floor Area mismatch (entered vs. calculated).

Problem: The total [Gross Floor Area](#) (GFA) that you entered for your property does not match the total calculated by EPA by adding the GFA for each Property Use.

- Self-Reported Property GFA: 100000 sq. ft.
- EPA-Calculated Property GFA: 110000 sq. ft.

What to do:

- If the GFA for one of your Property Uses doesn't look right, it might be because it's [time-weighted](#).
- If the EPA-Calculated GFA doesn't look right, it might be because you changed the GFA of one Property Use, but didn't change the GFA of another Property Use on the same day, in the same amount. [See this FAQ](#).
- [Correct your Self-Reported Property GFA](#) or correct your Property Uses by clicking on their names from the [Details](#) tab. [Learn more about these two types of GFA](#).

Property has no waste or material meters.

There are no waste meters entered for this property. In order to track waste and/or materials and receive metrics, you must create a waste or material meter.

What to do:

- [Create a meter](#) and follow the steps to enter your waste and material meter entries. Make sure you select the meter(s) that should be included in your performance metrics.

Cancel

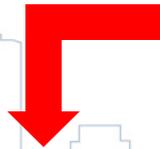
About Alerts

-  Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.
-  Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.



Including Alerts in Custom Report Templates

- When defining custom reporting templates in Portfolio Manager, you can include certain alert fields
- Useful for reviewing alerts across multiple properties at once
- See Portfolio Manager training resources



Select Information & Metrics Selected items: 15 of 50 maximum [View Selection and Order](#)

Property Information	<input checked="" type="checkbox"/> Estimated Values - Energy
Property ID Numbers	<input checked="" type="checkbox"/> Estimated Values - Water
Property Use Details	<input type="checkbox"/> Estimated Values - Waste
Energy Use by Fuel Source	<input type="checkbox"/> Default Values
Data Accuracy	<input type="checkbox"/> Temporary Values
Energy Performance Metrics	<input checked="" type="checkbox"/> Data Quality Checker Run?
Water Performance Metrics	<input checked="" type="checkbox"/> Data Quality Checker - Date Run
Waste Performance Metrics	<input checked="" type="checkbox"/> Alert - No meters are associated with this property
Cost Performance Metrics	<input checked="" type="checkbox"/> Alert - Meter has less than 12 full calendar months of data
Greenhouse Gas Emissions	<input checked="" type="checkbox"/> Alert - Meter has gaps
Renewable Energy & Green Power	<input checked="" type="checkbox"/> Alert - Meter has overlaps
ENERGY STAR Certification	<input checked="" type="checkbox"/> Alert - Individual monthly meter entry is more than 65 days long
Property Design	<input type="checkbox"/> Alert - Data Center does not have an IT Meter
	<input checked="" type="checkbox"/> Alert - Property has no uses
	<input checked="" type="checkbox"/> Alert - Gross Floor Area is 0 ft2
	<input type="checkbox"/> Default Data Flag - Bank Branch
	<input type="checkbox"/> Default Data Flag - Barracks
	<input type="checkbox"/> Default Data Flag - Courthouse
	<input type="checkbox"/> Default Data Flag - Data Center
	<input type="checkbox"/> Default Data Flag - Distribution Center
	<input type="checkbox"/> Default Data Flag - Financial Office
	<input type="checkbox"/> Default Data Flag - Hospital (General Medical & Surgical)

[Download Full List of Information & Metrics](#) Selected items: 15 of 50 maximum [View Selection and Order](#) [Apply Selection](#) [Cancel](#)

HUD Example
 Date Downloaded: 04/20/2017 12:11 PM EDT
 Date Generated: 04/20/2017 12:10 PM EDT
 Number of properties in report: 4

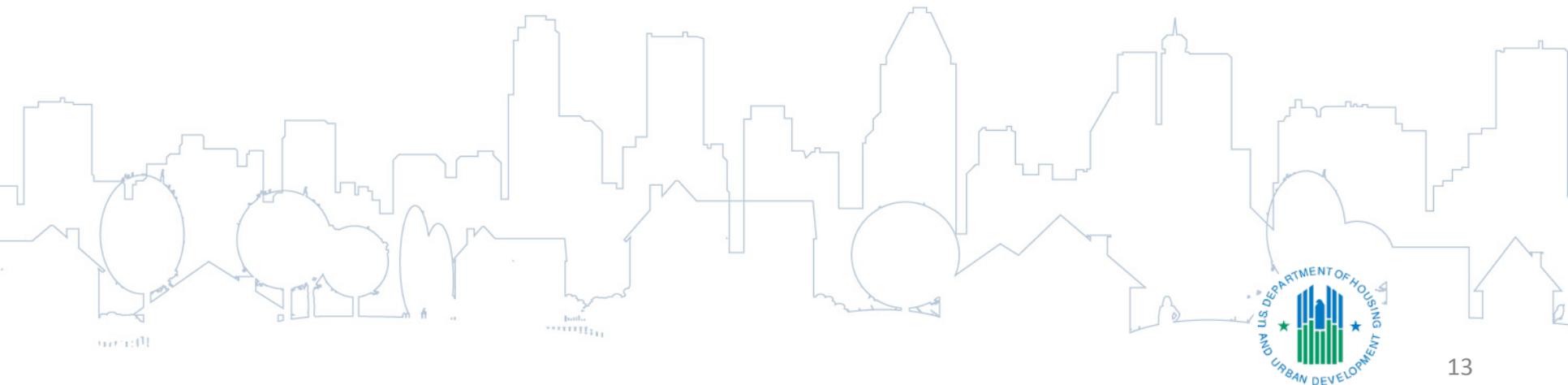
Property Id	Property Name	Parent Property Name	Year Ending	Estimated Values - Energy	Estimated Values - Water	Data Quality Checker Run?	Data Quality Checker - Date Run	Alert - No meters are associated with this property	Alert - Meter has less than 12 full calendar months of data	Alert - Meter has gaps	Alert - Meter has overlaps	Alert - Individual monthly meter entry is more than 65 days long	Alert - Property has no uses	Alert - Gross Floor Area is 0 ft2
5818271	Sample Multifamily Building 1	Parent Property for 3 Building Campus	12/31/2016	No	Unable to Check (not enough data)	Yes	2017-04-20	Ok	Possible Issue	Ok	Ok	Ok	Ok	Ok
5819176	Sample Multifamily Building 2	Parent Property for 3 Building Campus	12/31/2016	No	Unable to Check (not enough data)	No	Not Available	Ok	Ok	Ok	Ok	Ok	Ok	Ok
5819178	Sample Multifamily Building 3	Parent Property for 3 Building Campus	12/31/2016	No	Unable to Check (not enough data)	No	Not Available	Ok	Ok	Ok	Ok	Ok	Ok	Ok
5831094	Parent Property for 3 Building Campus	Parent Property for 3 Building Campus	12/31/2016	No	Unable to Check (not enough data)	No	Not Available	Ok	Possible Issue	Ok	Ok	Ok	Ok	Ok

Summary List of Portfolio Manager Alerts

- ENERGY STAR provides a complete list of [alerts generated within Portfolio Manager](#), including where/when they may show up
- 74 total alerts available

List of ENERGY STAR Portfolio Manager® Alerts					
This comprehensive list shows all of the alerts (or, data flags) that you may encounter in Portfolio Manager. You will primarily see alerts in three locations, but note that not all alerts show in all three places:					
o Data Quality Checker - You can run the Data Quality Checker from the Summary tab of any property to check for incomplete or unusual data.					
o N/A Explanations - If we cannot compute a metric, like Source EUI or the ENERGY STAR score, you can click on "Not Available" for information on why.					
o Custom Reports - A handful of basic alerts can be exported into your custom Excel reports from the Reporting tab					
Alert Number	Alert Name	Type Of Data Flagged	Data Quality Checker	N/A Explanations	Custom Reports
1	Property has no energy meters.	Energy	Yes	Yes	No
2	Property has no water meters.	Water	Yes	Yes	No
3	No meters selected for performance metrics.	Energy, Water	Yes	Yes	Yes
4	There is not 12 full months of meter data.	Energy, Water, Flow, IT Energy	Yes	Yes	Yes
5	There is not 12 full months of cost data.	Energy, Water, IT Energy	No	Yes	No
6	There is no meter of the type for this metric.	Energy, Water, Flow, IT Energy	No	Yes	No
7	Do not have at least one (Use Details) meter active for each of the 12 months in the year selected.	Energy, Water, Flow, IT Energy	Yes	Yes	No
8	Meter(s) with gaps in bills.	Energy, Water, Flow, IT Energy	Yes	Yes	Yes
9	Meter(s) with overlaps in bills.	Energy, Water, Flow, IT Energy	Yes	Yes	Yes
10	Insufficient data for Baseline or Current Date	Energy, Water	No	Yes	No
11	Data Center(s) without IT Energy meters.	IT Energy	Yes	Yes	Yes
12	Water or Wastewater Plant(s) without Plant Flow meters.	Flow	Yes	Yes	No
13	There are no Property Uses.	Use Details	Yes	Yes	Yes
14	One or more Property Use has less than 12 full calendar months of Gross Floor Area for the year selected.	Use Details	Yes	Yes	No
15	Total Gross Floor Area is zero for the year selected.	Use Details	Yes	Yes	Yes

Sharing and Reporting Your Utility Benchmarking Results



Sharing Data in Portfolio Manager

- “Sharing” is used to provide other Portfolio Manager users with access to one or more specific property records
- Possible to share with different access levels (Read-Only, Full Access, Custom)

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.



Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Multiple Properties

[Selected Properties: 4](#)



Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

Andrew Schulte (arsdemoaccount)
Andrew Schulte (SCHULTEA)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

- * **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
 - Read Only Access
 - Full Access
 - Custom Access (meters are all shared at the same level)
 - Exchange Data (You can share in bulk for exchanging data [here](#) or you can assign permissions one by one for each property using the radio button below.)
 - Remove Access
- Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

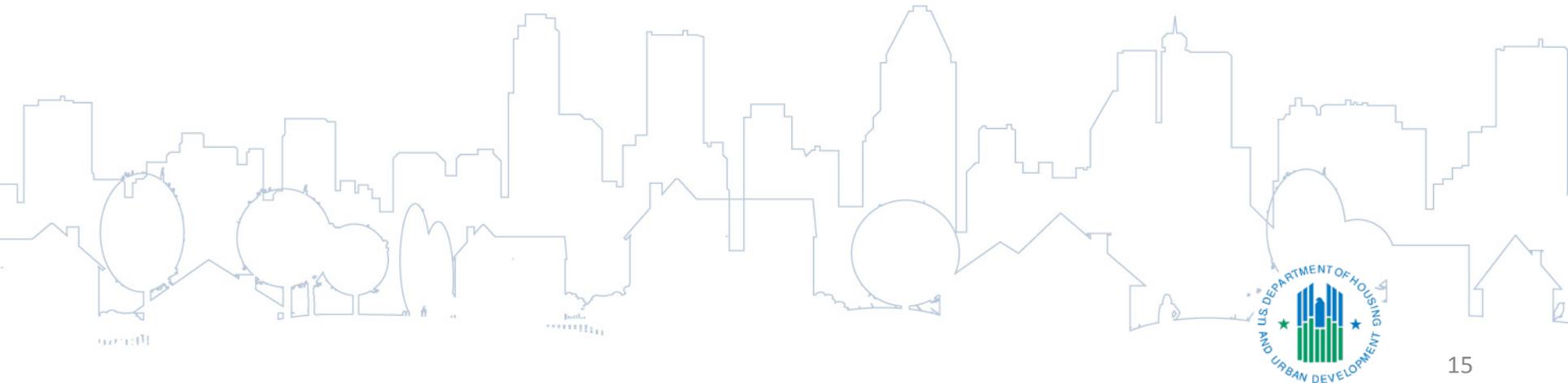
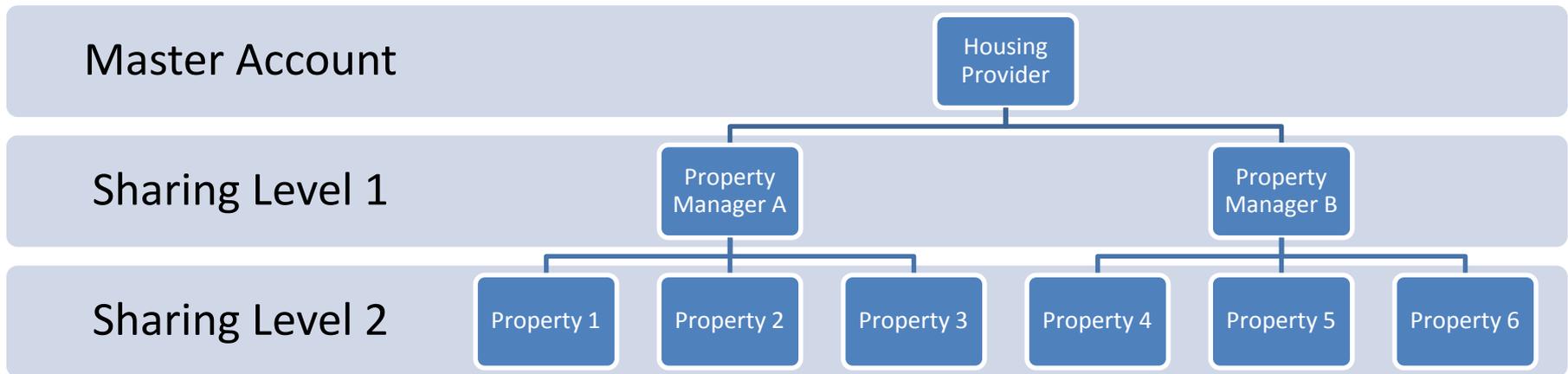
Exchanging Data

To get started, first [connect with an organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note: you can now share in bulk for [exchanging data](#).**

Who gets to Share Forward?

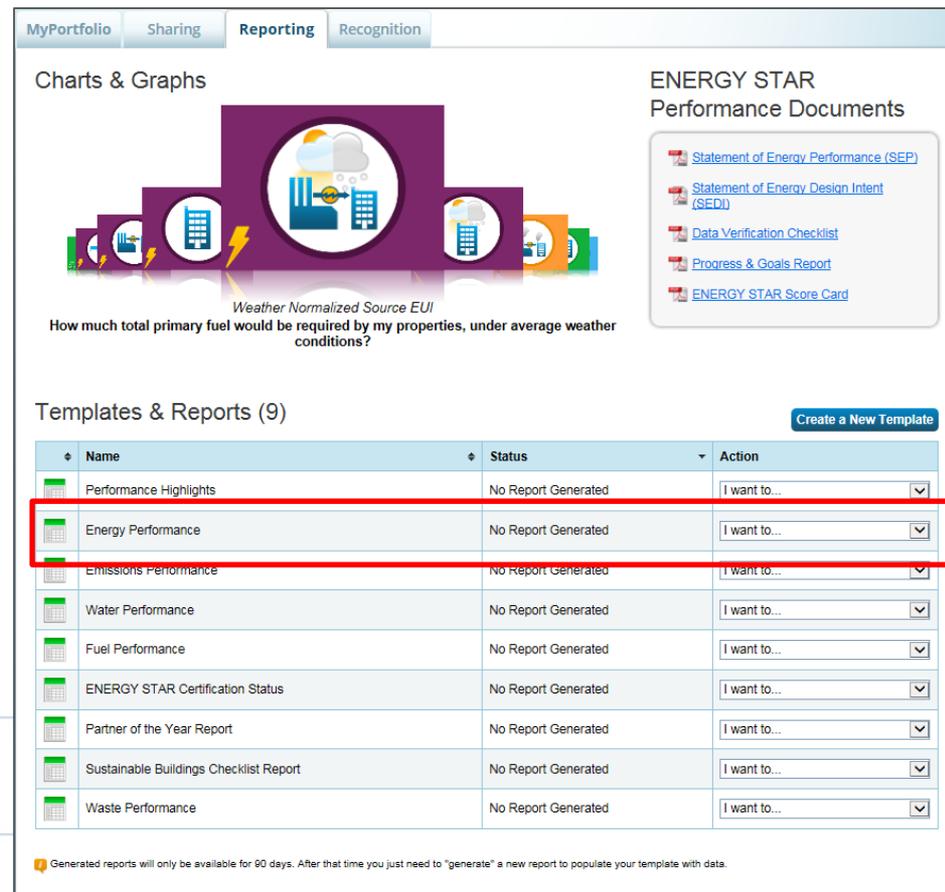
Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sharing Data in Portfolio Manager - Options



Using Portfolio Manager's Reporting Tools

- Pre-existing reporting templates available in Portfolio Manager
- Also ability to define “custom” reporting templates
- Results can be viewed within Portfolio Manager, or exported to Excel for further analysis



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Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card

Templates & Reports (9)

Create a New Template

Name	Status	Action
Performance Highlights	No Report Generated	I want to...
Energy Performance	No Report Generated	I want to...
Emissions Performance	No Report Generated	I want to...
Water Performance	No Report Generated	I want to...
Fuel Performance	No Report Generated	I want to...
ENERGY STAR Certification Status	No Report Generated	I want to...
Partner of the Year Report	No Report Generated	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...
Waste Performance	No Report Generated	I want to...

Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

Standard Reports

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Create Energy Performance

In order to generate the spreadsheet, you will need to first select the timeframe of information to include as well as the properties from your account that you would like to see in the spreadsheet. Once you have done this, you will be able to generate your spreadsheet.

- Select Timeframe**
 Timeframe:

Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the last day of the 12 month period that you want.
- Select Properties**
 Properties: [Select Properties](#) Selected items: 4
- Review Included Metrics**

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name
Property Information	City
Property Information	State/Province
Property Information	Postal Code
Property Information	Property GFA - EPA Calculated (Buildings)
Energy Performance Metrics	Site EUI
Energy Performance Metrics	Source EUI

[Generate Spreadsheet](#) [Cancel](#)

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Making Changes
 Once you select the timeframe and properties, they will be saved for the report. If you want to generate the report with a different timeframe or properties, you will need to come back here to make edits.

Need to Change the Metrics?
 Metrics in this template were selected by EPA to help you understand key aspects of your performance. If you'd like to make your own report with different metrics, you can [create a new template](#).



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View Report: Energy Performance

Date Generated: 04/20/2017 01:34 PM EDT
 Number of properties in report: 4

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics 4 records

Property Id	Property Name	Parent Property Id	Parent Property Name	Year Ending	City	State/Province
5831094	Parent Property for 3 Building Campus	5831094	Parent Property for 3 Building Campus	10/31/2016	Durham	North Carolina
5818271	Sample Multifamily Building 1	5831094	Parent Property for 3 Building Campus	10/31/2016	Durham	North Carolina
5819176	Sample Multifamily Building 2	5831094	Parent Property for 3 Building Campus	12/31/2016	Durham	North Carolina
5819178	Sample Multifamily Building 3	5831094	Parent Property for 3 Building Campus	12/31/2016	Durham	North Carolina

[Generate New Report](#) [Download Excel](#) [Download XML](#) [Close](#)

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Energy Performance
 Date Downloaded: 04/20/2017 01:38 PM EDT
 Date Generated: 04/20/2017 01:34 PM EDT
 Number of properties in report: 4

Property Id	Property Name	Year Ending	City	State/Province	Postal Code	Property GFA - EPA Calculated (Buildings) (R ²)	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)	Weather Normalized Site EUI (kBtu/ft ²)	Weather Normalized Source EUI (kBtu/ft ²)	Site EUI - Adjusted to Current Year (kBtu/ft ²)	Source EUI - Adjusted to Current Year (kBtu/ft ²)	National Median Site EUI (kBtu/ft ²)	National Median Source EUI (kBtu/ft ²)	% Difference from National Median Source EUI	Energy Cost (\$)
5818271	Sample Multifamily Building 1	10/31/2016	Durham	North Carolina	27701	110000	32.3	84.2	32.2	83.4	32.3	84.2	39.6	103.2	-18.5	Not Available
5819176	Sample Multifamily Building 2	12/31/2016	Durham	North Carolina	27701	100000	40.7	108.7	40.6	108.1	40.7	108.7	41.6	111.3	-2.4	Not Available
5819178	Sample Multifamily Building 3	12/31/2016	Durham	North Carolina	27701	100000	36.6	95.8	36.5	95.3	36.6	95.8	42.5	111.3	-13.9	Not Available
5831094	Parent Property for 3 Building Campus	10/31/2016	Durham	North Carolina	27701	310000	36.3	95.5	36.1	94.5	36.3	95.5	40.4	106.2	-10.1	Not Available

Custom Reports

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Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

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Fuel Performance	No Report Generated	I want to...
ENERGY STAR Certification Status	No Report Generated	I want to...
Partner of the Year Report	No Report Generated	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...
Waste Performance	No Report Generated	I want to...

Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.



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Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports or graphs using Excel. You can also use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you create with other people who may have similar needs with their properties.

- Name Your Template**
Name:
Please provide a unique name for this template.
- Select Timeframe**
Timeframe:
Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the last day of the 12 month period that you want.
- Select Properties**
Properties:
- Select Information & Metrics**
Information & Metrics: Selected Items: 4

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Tip
As you create and save your templates, they will appear in the Templates & Reports section of the Reporting tab. Keeping the names unique will make it easier for you to find and use your templates.

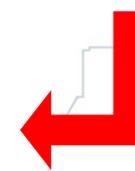
Tip
If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

Select Information & Metrics

Selected items: 4 of 50 maximum ([View Selection and Order](#))

- Property Information
 - Property Name
 - Parent Property Name
- Property ID Numbers
 - Address 1
 - Address 2
 - City
 - County
 - State/Province
 - Postal Code
 - Country
- Energy Use by Fuel Source
- Data Accuracy
- Energy Performance Metrics
- Water Performance Metrics
- Waste Performance Metrics
- Cost Performance Metrics
- Greenhouse Gas Emissions
- Renewable Energy & Green Power
- ENERGY STAR Certification
- Property Design
 - Property GFA - Self-Reported (ft²)
 - Property GFA - EPA Calculated (Buildings and Parking) (ft²)
 - Property GFA - EPA Calculated (Buildings) (ft²)
 - Property GFA - EPA Calculated (Parking) (ft²)
 - Primary Property Type - Self Selected
 - Primary Property Type - EPA Calculated
 - National Median Reference Property Type
 - List of All Property Use Types at Property
 - Largest Property Use Type
 - Largest Property Use Type - Gross Floor Area (ft²)
 - 2nd Largest Property Use Type
 - 2nd Largest Property Use - Gross Floor Area (ft²)
 - 3rd Largest Property Use Type

[Download Full List of Information & Metrics](#) Selected items: 4 of 50 maximum ([View Selection and Order](#))



ENERGY STAR Performance Documents

MyPortfolio | Sharing | Reporting | Recognition

Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card



Generate and Download Reports

Portfolio Manager offers several standard reports for properties that can be useful in communicating your property's progress with others. These reports offer detailed information about your property for a single time period and are presented in a PDF format. [You can view sample reports here.](#)

- Select Report(s) to Download
 - Statement of Energy Performance (SEP)
 - ENERGY STAR Data Verification Checklist
 - Score Card
 - Progress and Goals Report
 - Statement of Energy Design Intent (SEDI)
- Select Property for Report(s)

Property: Parent Property for 3 Building Campus
- Select Timeframe for Report(s)

Timeframe: Current Year
- Select Contacts for Report(s)

Select Property Contacts:

Primary Contact: Andrew Schulte (aschulte_HU) Add Contact

Property Owner: Select Organization Add Organization

Verifying Professional: Select Contact Add Contact

7 Prefer to design your own report?
If none of these reports look like what you need, consider creating a spreadsheet template to put the data you want and design your own report outside of Portfolio Manager.

7 Are you applying for recognition?
Although these reports look similar, if you are applying for either ENERGY STAR certification or Designed to Earn recognition, you must generate the required documentation by way of the application process.

7 Metrics on your Reports
In order to calculate metrics for your property for a given time period, there must be 12 months of complete meter data and property use detail information. If metrics (including the scores) cannot be calculated for any reason, they will appear as "N/A" in your report.

Generate & Download Report(s) Cancel



ENERGY STAR® Statement of Energy Performance

[LEARN MORE AT energystar.gov](http://energystar.gov)

67

ENERGY STAR® Score¹

Parent Property for 3 Building Campus

Primary Property Type: Multifamily Housing
Gross Floor Area (ft²): 300,000
Built: 2000

For Year Ending: December 31, 2016
Date Generated: May 02, 2017

1. The ENERGY STAR score is a 1-100 assessment of a building's energy efficiency as compared with similar buildings nationwide, adjusting for climate and business activity.

Property & Contact Information		
Property Address Parent Property for 3 Building Campus 123 Main Street Durham, North Carolina 27701	Property Owner _____ () - ____	Primary Contact Andrew Schulte 2635 Meridian Parkway Suite 200 Durham, NC 27713 919-293-1671 andrew.schulte@icf.com
Property ID: 5831094		

Energy Consumption and Energy Use Intensity (EUI)				
Site EUI 37.6 kBtu/ft ²	Annual Energy by Fuel		National Median Comparison	
	Natural Gas (kBtu)	2,733,226 (24%)		National Median Site EUI (kBtu/ft ²)
	Electric - Grid (kBtu)	8,560,708 (76%)	National Median Source EUI (kBtu/ft ²)	111.3
			% Diff from National Median Source EUI	-11%
Source EUI 99.2 kBtu/ft ²			Annual Emissions	
			Greenhouse Gas Emissions (Metric Tons CO ₂ e/year)	1,212

Third-Party Provider Reports

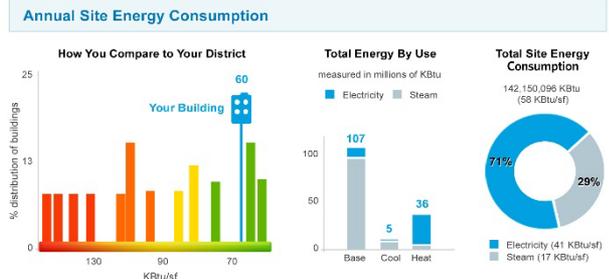
← Mar **Mar 2011** Mar →



Energy Usage Report

March 4, 2011

Owner: Building Owner
 Year Built: 1987
 Square Footage: 6,666 sf
 Analysis Period: 12/1/2006 - 12/1/2007



Owner Energy Whole Building **B** 49 kBTU/ft²/yr **Most Recent Year - Owner** Apr 2015 - Aug 2016

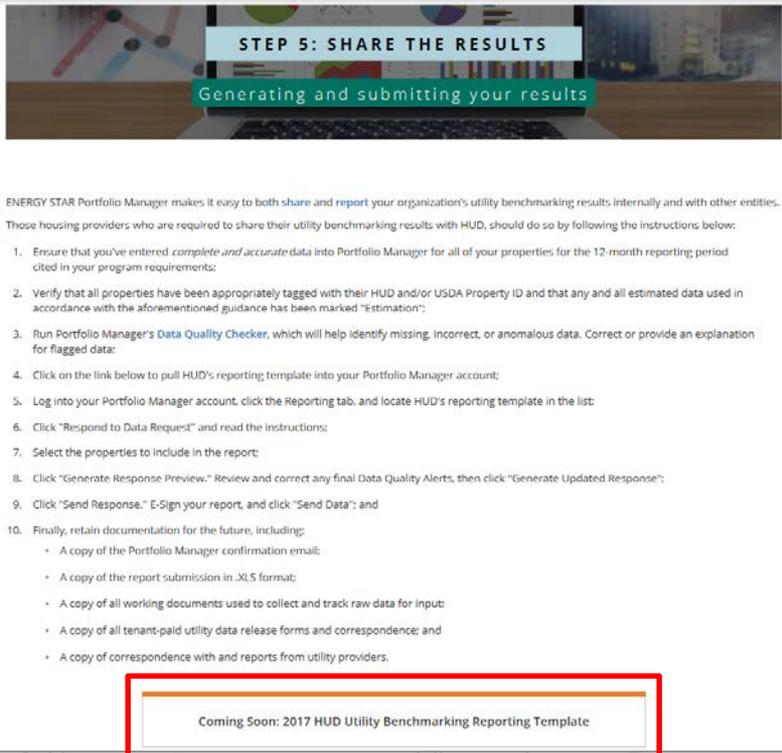
Category	Rating	Unit	Value	Target
Cooling Whole Building	B	2.0 BTU/ft ² /CDD	288 mmBTU	↓
Heating Whole Building	B	4.2 BTU/ft ² /HDD	4,946 mmBTU	↑
Electric Baseload Whole Building	B	4,477 kWh/unit/yr	3,116 mmBTU	↑
Fossil Fuel Baseload Whole Building	A	4.60 mmBTU/bdmi/yr	1,370 mmBTU	↓
Water	A	46.1 gal/bdm/day	0 mmBTU	↓

Summary: Electric 997,950 kWh | Gas 63,175 Therms | Water 5,015 kGal | Total Energy 9,722 mmBTU



Reporting to HUD through Portfolio Manager

- First, make sure that:
 - All required benchmarking data is complete
 - Properties have been tagged with their HUD and/or USDA Property IDs, as appropriate
 - Any tenant-paid utility data based on sampling has been marked as “Estimated”
 - Data quality checks have been performed in Portfolio Manager
- Then, click the link provided in the HUD Toolkit and log into your Portfolio Manager account when prompted



STEP 5: SHARE THE RESULTS
Generating and submitting your results

ENERGY STAR Portfolio Manager makes it easy to both share and report your organization's utility benchmarking results internally and with other entities. Those housing providers who are required to share their utility benchmarking results with HUD, should do so by following the instructions below:

1. Ensure that you've entered *complete and accurate* data into Portfolio Manager for all of your properties for the 12-month reporting period cited in your program requirements;
2. Verify that all properties have been appropriately tagged with their HUD and/or USDA Property ID and that any and all estimated data used in accordance with the aforementioned guidance has been marked "Estimation";
3. Run Portfolio Manager's Data Quality Checker, which will help identify missing, incorrect, or anomalous data. Correct or provide an explanation for flagged data;
4. Click on the link below to pull HUD's reporting template into your Portfolio Manager account;
5. Log into your Portfolio Manager account, click the Reporting tab, and locate HUD's reporting template in the list;
6. Click "Respond to Data Request" and read the instructions;
7. Select the properties to include in the report;
8. Click "Generate Response Preview." Review and correct any final Data Quality Alerts, then click "Generate Updated Response";
9. Click "Send Response," E-Sign your report, and click "Send Data"; and
10. Finally, retain documentation for the future, including:
 - A copy of the Portfolio Manager confirmation email;
 - A copy of the report submission in .XLS format;
 - A copy of all working documents used to collect and track raw data for input;
 - A copy of all tenant-paid utility data release forms and correspondence; and
 - A copy of correspondence with and reports from utility providers.

[Coming Soon: 2017 HUD Utility Benchmarking Reporting Template](#)

Reporting to HUD through Portfolio Manager (cont'd.)

- The reporting fields have been pre-defined by the requestor
- Housing providers will simply select the properties that they are including in their response
- Then click “Generate Response Preview”

The screenshot displays the 'Reporting' tab in the HUD Portfolio Manager interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification box at the top states: 'Complete this form to respond to the "Data Request: HUD Utility Benchmarking Report DEMO" for Julia Hustwit. This response has also been added to your "Templates & Reports" list on the Reporting tab.' Below this, the main heading reads 'Respond to Data Request: Data Request: HUD Utility Benchmarking Report DEMO from Julia Hustwit (US Dept. of Housing & Urban Development)'. The form is divided into three main sections: 'About this Data Request', 'About Your Response', and 'Your Response'. The 'About this Data Request' section includes the requester's name (Julia Hustwit), instructions to select all properties and include specific IDs, and contact information. The 'About Your Response' section asks 'Who is this data being submitted on behalf of?' with radio buttons for 'myself' and 'someone else'. The 'Your Response' section has a 'Select Information to Include:' header. It features a 'Timeframe' dropdown set to 'Single Year' with sub-selects for 'Dec 31' and '2015', accompanied by an information icon and a note that the timeframe cannot be changed if specified by the requestor. Below that, the 'Properties' dropdown is set to 'Multiple Properties', with a 'Select Properties' button and a 'Selected Properties: 4' indicator. Another information icon and note are present, stating that standard IDs must be entered for each property. On the right side of the form, there are three informational callouts: 'Responding to Data Requests' (explaining the purpose of the screen), 'Submitting Data for Someone Else' (explaining delegation), and 'Previewing Reports' (explaining the preview process). At the bottom right, there is a blue 'Generate Response Preview' button and a 'Cancel' link.

Reporting to HUD through Portfolio Manager (cont'd.)

- From your list of reports, you can choose to “Preview Response” and review the data compiled for submission to HUD
- Make sure this information is complete and correct.
- If necessary, you can update benchmarking information and then select “Generate an Updated Response”
- When ready, select “Send Response”

The screenshot displays the 'Reporting' tab in the Portfolio Manager interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is divided into several sections:

- Charts & Graphs:** Features a bar chart titled 'Weather Normalized Source EUI' with the question 'How much total primary fuel would be required by my properties, under average weather conditions?'. The chart shows five bars of varying heights, with the tallest bar in the center.
- ENERGY STAR Performance Documents:** A list of document links including 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', and 'ENERGY STAR Score Card'.
- Templates & Reports (10):** A section with a 'Create a New Template' button. It contains two green notification boxes: 'Your new report(s) has been generated' and 'Your new response preview(s) has been generated.'
- Table:** A table with columns for Name, Status, and Action. The first row shows a 'Data Request: HUD Utility Benchmarking Report DEMO (Request from Julia Hustwit)' with a status of 'Response Preview Generated: 4/20/2017 2:37 PM'. The Action column has a dropdown menu with options: 'I want to...', 'I want to...', 'Edit Properties and Timeframe', 'Preview Response', 'Download Preview in Excel', 'Generate an Updated Response', 'Send Response', and 'Delete Response'.

The U.S. Department of Housing and Urban Development logo is visible in the bottom right corner of the interface.

Reporting to HUD through Portfolio Manager (cont'd.)

- When you select “Send Response,” you will be taken to a final confirmation page
- Sign your data release, then click “Send Data”
- You will receive a confirmation email, along with a copy of the data that you submitted to HUD

The screenshot shows a web interface for confirming a data request. At the top, there are navigation tabs: MyPortfolio, Sharing, Reporting, and Recognition. The main heading is "Confirm Response to Data Request from Julia Hustwit (US Dept. of Housing & Urban Development)". Below this, a sub-heading reads: "By clicking Send Data, you will release data to Julia Hustwit (US Dept. of Housing & Urban Development). You will receive a confirmation email with a receipt and a copy of the data attached."

1 Who (besides you) should we send a confirmation email to?
Select contacts from your contacts book:
A list box contains two entries: "Andrew Schulte (aschulte_HUD_dem)" and "Andrew Schulte (SCHULTEA)".
Below the list, it says: "To select multiple contacts, hold down your Control (CTRL) key and click on each selection."
Optional- Additional Email Addresses:
An empty text input field with a vertical scrollbar is provided.
Below the field, it says: "Separate multiple emails by a comma or semicolon."

2 What format would you like your data in for the email attachment?
 Excel
 XML

3 E-Sign your Data Response
 I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Julia Hustwit with US Dept. of Housing & Urban Development.
Your username: * [input field]
Your password: * [input field]
[E-Sign Response button]

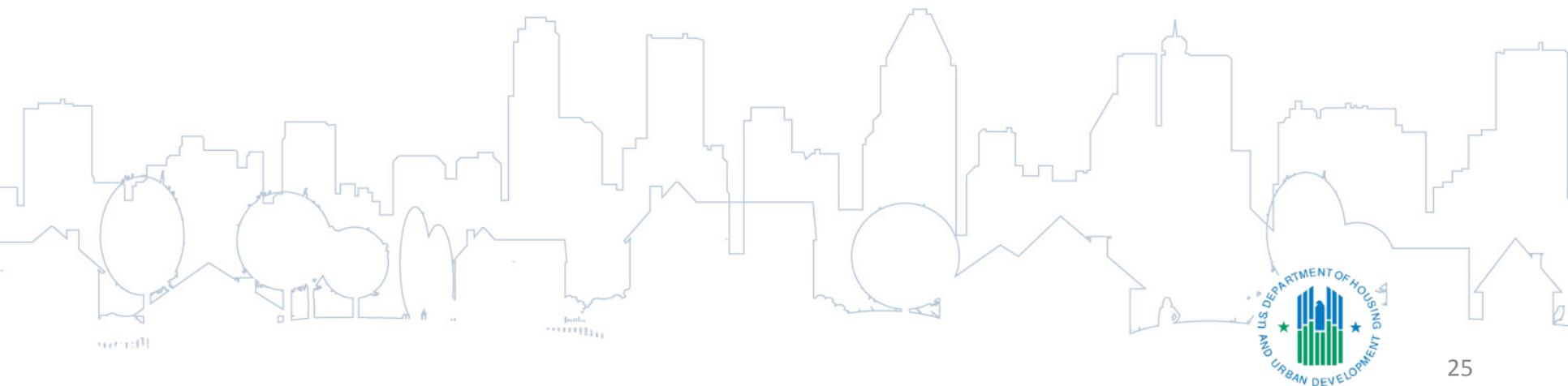
[Send Data button] [Cancel link]

About Releasing Your Data
Once you have chosen to release your data, there is no way to retract it. Please [preview](#) your report to identify any data issues before sending to avoid incomplete or incorrect data being released.

About Signing Your Response
Please provide login credentials (username and password) to electronically sign your response.

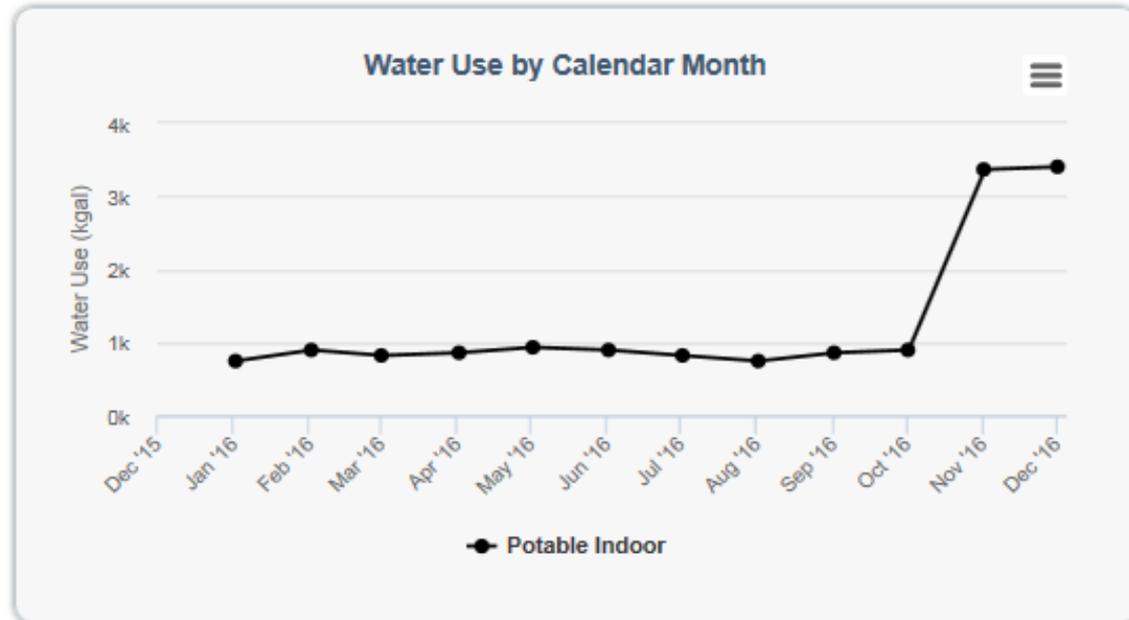
Follow Us [Twitter] [Facebook] [YouTube] [LinkedIn] | [Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Using Your Benchmarking Results to Make Informed Decisions



Identify Excess Consumption

- Portfolio Manager graphs consumption by utility type
- Spikes in consumption can be examined to see if they reflect leaks, billing errors, or equipment malfunctions



 [Export Data by Calendar Month](#)

Water Meters - Used to Compute Metrics (1)

[Add A Meter](#)

[Change Meter Selections](#)

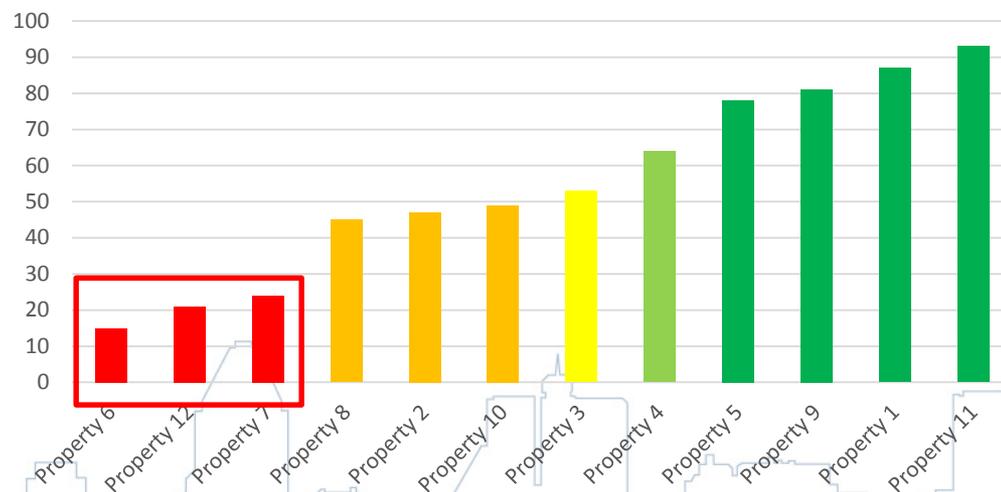
 [View as a Diagram](#)

Name Meter ID	Water Meter Type	Most Recent Bill Date	In Use? (Inactive Date)
Potable Indoor Meter 28338628	Potable Indoor	12/31/2016	Yes

Identify and Prioritize Poor Performers

- Housing providers can analyze benchmarking metrics across properties and identify the lowest performers
- These properties may represent the best place to start with improvements/upgrades

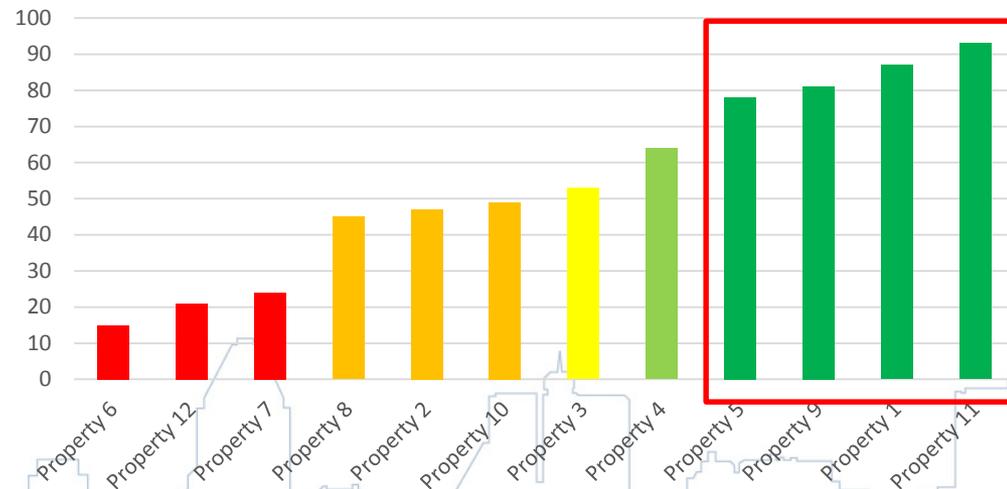
ENERGY STAR Score



Identify and Recognize Top Performers

- Top performers may be eligible for recognition
- Best practices of top performers can be identified and communicated across the portfolio

ENERGY STAR Score



Set Portfolio-Wide Savings Goals

- Portfolio Manager includes baseline and target-setting functionality at the property level
- Target metrics can be selected for inclusion in custom reporting templates – allowing you to look at goals across properties

MyPortfolio | Sharing | Reporting | Recognition

Sample Multifamily Building 2
123 Main Street, Durham, NC 27701 | [Map It](#)
Portfolio Manager Property ID: 5819176
Year Built: 2000 | Parent Property: [Parent Property for 3 Building Campus](#)
[Edit](#)

ENERGY STAR Score (1-100)
Current Score: 53
Baseline Score: 71

Summary | Details | Energy | Water | Waste & Materials | **Goals** | Design

Energy Performance (kBtu/ft²)

Metric	Dec 2014 (Energy Baseline)	Dec 2016 (Energy Current)	Target*	Median Property*
ENERGY STAR score (1-100)	71	53	75	50
Source EUI (kBtu/ft ²)	95.8	108.7	93.6	111.3
Site EUI (kBtu/ft ²)	36.6	40.7	35.0	41.6
Source Energy Use (kBtu)	9,580,012.5	10,895,653.9	9,361,628.1	11,127,543.1
Site Energy Use (kBtu)	3,656,690.0	4,068,099.9	3,503,270.1	4,164,103.6
Energy Cost (\$)	Not Available	Not Available	Not Available	Not Available
Total GHG Emissions (Metric Tons CO ₂ e)	390.8	441.8	380.7	452.5

* To compute the metrics at the target and median levels of performance, we will use the fuel mix associated with your property's current energy use.

Current Baselines & Targets

	Baselines	Target
Energy	12/31/2014	75
Water	Not Available	Not Available
Waste/Materials	Not Available	Not Available

[Set Baselines or Target](#)

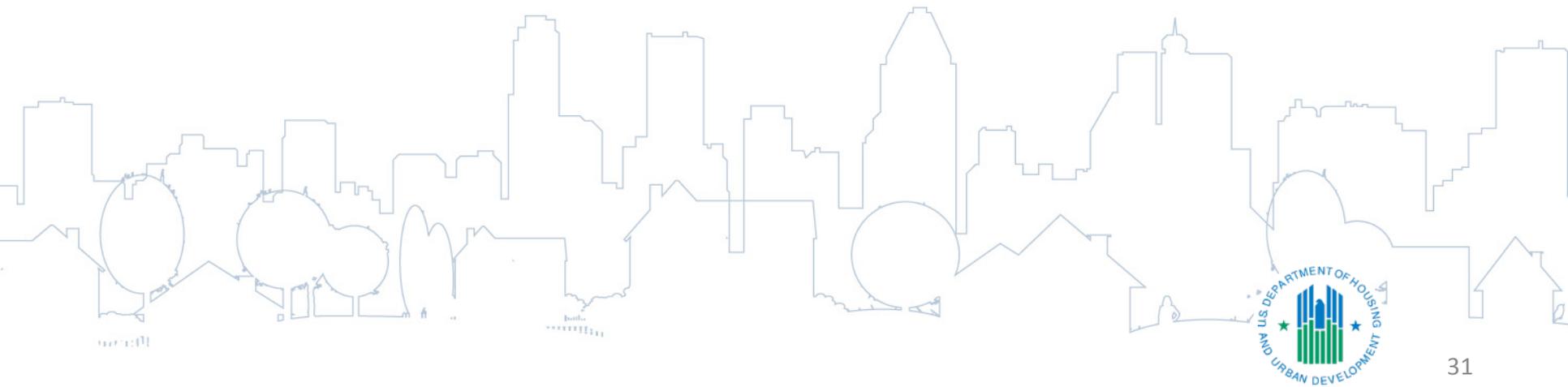
U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Key Concepts for Pursuing Efficiency Improvements

- Consider starting with low- and no-cost energy and water efficiency improvements (and quick fixes)
 - Establish the financial and environmental benefits of utility management
 - Demonstrate the value of these efforts to leadership, staff, and residents
 - Realize significant and rapid savings from operational and behavioral approaches
- Consider how to leverage low- and no-cost savings to help fund more intensive retrofits
- Capital investment needs may be lower when utility waste is reduced through low- and no-cost measures

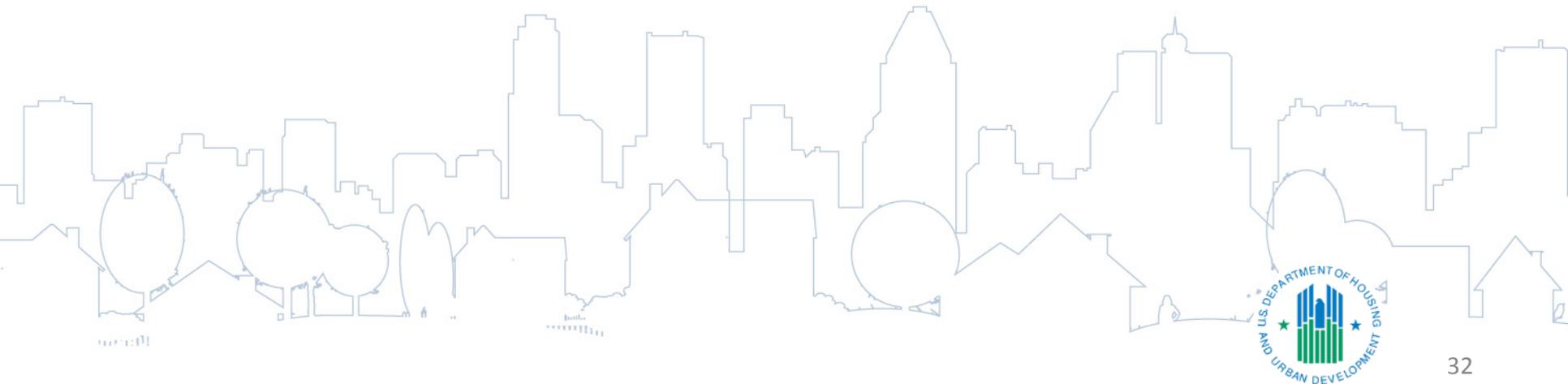


What's Next?



Upcoming Webinars and Events

- May 15 – 17
Better Buildings Summit, Washington, DC
- **POSTPONED**
Webinar 6: Multifamily Utility Benchmarking
Requirements and Funding Opportunities

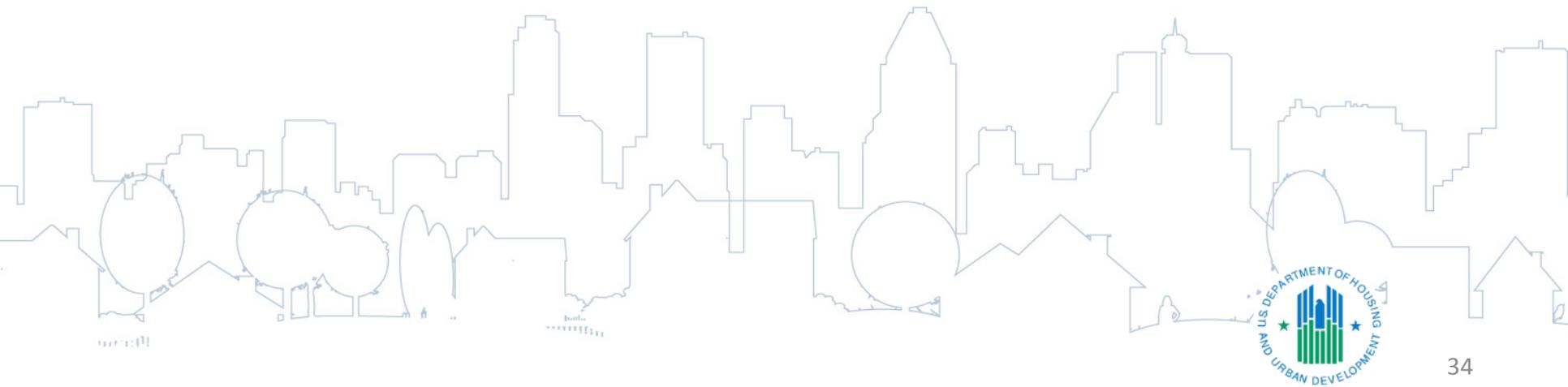


Webinar Registration and Archives

- All those who have registered for Webinar 6 will remain registered
- When a new date is determined, a message will be sent to registrants as well as the broader listservs announcing the new date and time
- If you missed a previous webinar, go to the Archive section under “Events and Training” on the [HUD Exchange Utility Benchmarking website](#) for links to each webinar’s recording and other resources.



Questions?



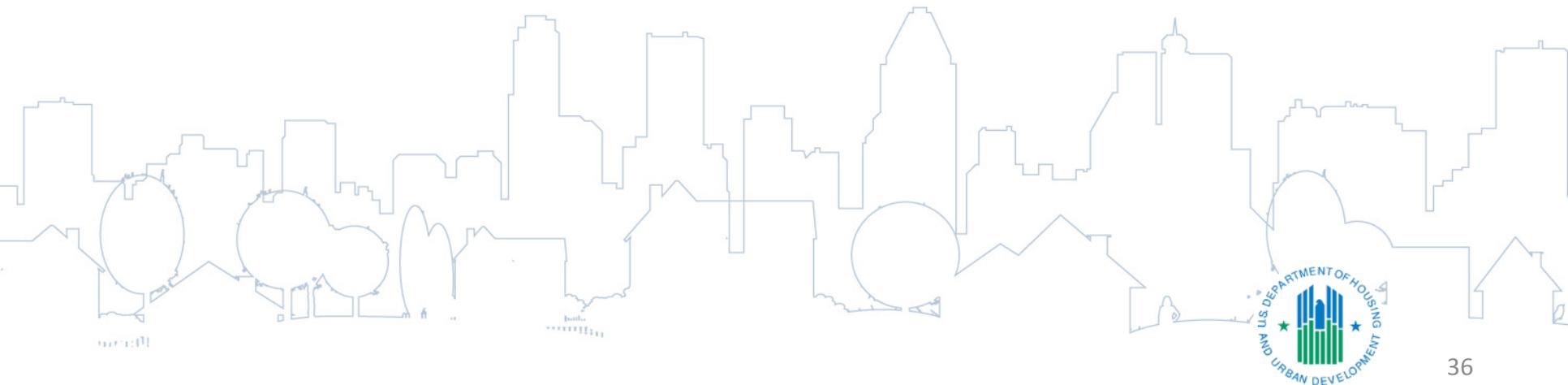
Related Resources

- [HUD Multifamily Utility Benchmarking Toolkit](#)
- ENERGY STAR Frequently Asked Questions:
 - [How Can I Find and Fix Errors in My Data?](#)
 - [What Are Alert Icons?](#)
- ENERGY STAR Training Resources
 - [How to share properties with other users in Portfolio Manager](#)
 - [How to respond to data requests in Portfolio Manager](#)
 - [Portfolio Manager standard reports](#)
 - [Portfolio Manager custom reporting guide](#)
 - [List of Portfolio Manager alerts](#)
 - [Full list of Portfolio Manager custom reporting metrics](#)



Related Resources (cont'd.)

- Best Practices Guidance from ENERGY STAR
 - [Low- and No-Cost Energy Efficiency Measures](#)
 - [No- and Low-Cost Energy-Saving Tips for Multifamily Housing Common Areas](#)
 - [No- and Low-Cost Checklist for Saving Energy and Water in Multifamily Housing](#)



Contact Information

- Julia Hustwit
 - Julia.B.Hustwit@hud.gov
- Scott Ledford
 - Scott.Ledford@icf.com
- Andrew Schulte
 - Andrew.Schulte@icf.com



Thank you, and watch
for updates about
Webinar 6!

