

NJHMFA ENERGY BENCHMARKING TECHNICAL MANUAL

EXECUTIVE SUMMARY

This technical manual provides guidelines for building managers to successfully benchmark and report their energy usage to the New Jersey Housing and Mortgage Finance Agency (HMFA). Benchmarking is necessary for HMFA to assess sustained performance and compare each building to similar building types on their sustained performance, track the overall progress of efficiency upgrades, and effectively allocate our resources to proven models. Collected benchmarking data will be used to facilitate efficient analysis of energy performance for better management of energy usage, decreased energy expenditures, identify interesting energy use trends over time, decreased carbon emissions, and comparison of energy usage among similar locations and building types. It will allow HMFA to quantitatively compare energy usage in the newer buildings vs. the older buildings and the energy usage in the HMFA buildings that have incorporated energy efficiency measures vs. the buildings that have not received energy efficiency improvements.

DEFINITION OF ENERGY BENCHMARKING

Energy benchmarking is the process of analyzing energy usage over time and comparing the total use to the total cost. Because energy usage is affected by changes in temperature, benchmarking incorporates hot and cold weather data in order to determine the peak usage periods over time. The final results are generally expressed based upon square foot use. This allows for multiple buildings to be aggregated and compared. It is good measurement for evaluating building energy performance based on the type of building, occupancy, fuel source(s), location, weather, etc.

PURPOSE OF ENERGY BENCHMARKING

The purpose for benchmarking the energy performance of the buildings within the HMFA portfolio is to gain a better understanding of how the buildings use their energy and whether the energy efficiency measures that have been implemented within our buildings have realized their expected energy savings. It will also help us understand how our buildings are performing compared to similar buildings in other states. This analysis also has implications that can guide how HMFA provides financing in the future by:

1. Identifying properties that could benefit from energy efficiency upgrades;
2. Providing guidance for future energy efficiency program development;
3. Providing an underwriting basis for expected utility cost reduction achieved through energy efficiency and renewable energy programs

GETTING STARTED

The following instructions will guide you through the process of collecting the utility data, granting HMFA access to the information, and uploading the information online through the EPA Portfolio Manager system.

IMPORTANT NOTES:

- In order to qualify for this point, the application shall include a copy of the completed, signed and submitted letter of intent from the developer to NJHMFA.
- Prior to issuance of the 8609, developer/owner will submit a signed energy benchmarking utility release form for all common area meters (gas, oil, and electric, etc.), provision of certain project data (square footage per building, mechanical systems installed, etc.) and signed energy benchmarking utility release forms for a minimum of **50%** of tenants rented up at time of 8609 issuance for new construction, or a minimum of **30%** of each unit type for renovation projects, at time of 8609 issuance. Applicant is required to include the tenant utility release form as a part of the lease agreement. *See details concerning larger projects on the next page.*
- For the next three years following issuance of the 8609, the applicant will ensure that the required percentage of tenants have viable utility release forms (or provide documentation of the efforts to obtain such forms); or for renovation projects, for 1 year prior and 2 years after the work is completed. For both new construction and renovation projects, common area utility data shall also be uploaded into the EPA Portfolio Manager. <https://www.energystar.gov/buildings/benchmark>
- NJHMFA does not provide additional, set-aside funding for Green Items covered by this program.

SUBMIT ALL REQUIRED DOCUMENTATION AFTER A TAX CREDIT ALLOCATION TO:

Please send all required documents to:

John Ternes
NJ Housing and Mortgage Finance Agency
jternes@njhmfa.state.nj.us
Phone: 609.278.7696

RESOURCES:

EnergyStar Portfolio Manager:

<https://www.energystar.gov/istar/pmpam/>

How to Guides:

<https://www.energystar.gov/buildings/training/how-guides>

Pre-Recorded Energy Benchmarking Training-

<https://www.energystar.gov/buildings/training>

PROCEDURES

Use the following checklist as a guide as you benchmark the building and tenant utility usage.

- **STEP 1:** Sign and submit Letter of Intent to HMFA
- **STEP 2:** Set-up meeting and/or conference call with HMFA's Technical Services Division.
- **STEP 3:** Gather building and space attribute information using the **HMFA ENERGY BENCHMARKING SURVEY FORM**.
- **STEP 4:** **COMPLETE AND SIGN the BUILDING OWNER UTILITY RELEASE FORM**
- **STEP 5:** Have the tenants **COMPLETE AND SIGN the TENANT UTILITY RELEASE FORM**
- **STEP 6:** Collect **12 CONSECUTIVE MONTHS** of **BUILDING UTILITY BILLS***
 - ***For New Construction, begin to collect utility data 6 months after the start of rent-up.**
- **STEP 7:** Create a building profile in **PORTFOLIO MANAGER (SEE APPENDIX B)**
 - Portfolio Manager Username (do not submit to HMFA): _____
 - Portfolio Manager password (do not submit to HMFA): _____
- **STEP 8:** Upload **BUILDING** utility data into **PORTFOLIO Manager (www.energystar.gov/benchmark)**
- **STEP 9:** Input property information & send invite to share property with NJHMFA
- **STEP 10:** Submit the following items to HMFA
 - HMFA Benchmarking survey form
 - Tenant and Building utility release forms (50% of Total # of tenants for new construction and at least 30% of each unit type for renovation projects)

Additional Guidance for Large Projects:

0-150 units 50% for new, 30% for rehab

151-200 units 25% all

201-300 units 20% all

301 and above 18% all

Samples should include all model types – studios, all bedroom counts, as well as a distribution throughout the building/complex: ground floor, middle, top floors, inside & outside walls.

LETTER OF INTENT – ENERGY BENCHMARKING INITIATIVE

Please **e-mail** a signed copy of this page to NJHFMA Technical Services and include in Tax Credit Application.

By signing this document, I certify the following (“we” refers to the applicant organization):

1. **We have received and reviewed the Program’s materials, consisting of the ‘LIHTC Green Point Requirements 2022’ and ‘Energy Benchmarking’ documents, which includes the Letter of Intent, Building Utility Release Form and Survey, and Tenant Utility Release Form.**
2. **We understand that a meeting with Technical Services is required within three (3) months of the Tax Credit Award Date.**
3. **We understand that prior to issuance of the 8609 we will submit a signed energy benchmarking utility release form for all common area meters (gas, oil, and electric, etc.), provision of certain project data (square footage per building, mechanical systems installed, etc.) and signed energy benchmarking utility release forms for a minimum of 50% of tenants rented up for new construction, or a minimum of 30% of each unit type for renovation projects, at time of 8609 issuance.**
4. **We understand for the next three years after new construction, we will ensure that at least 50% of all tenants have viable utility release forms; or for renovation projects, for 1 year prior and 2 years after the work is completed we will ensure that for at least 30% of each unit type, we will collect the utility data from the applicable utility company on a semi-annual basis.**
5. **If requested we will allow NJHMFA staff access to the project site pre, during and post construction for the purpose of but not limited to: project monitoring, performance testing, interviews, surveys and photographs.**
6. **I am an authorized representative of the organization.**

Signature:

_____ **Date:** _____

Name of signer: _____

Title: _____

Project Name: _____

Organization: _____

ENERGY BENCHMARKING SURVEY FORM

Please complete one Building Data Form for each building in a development.

BUILDING DATA

Development Name: _____ NJHMFA #: _____

Address: _____ Year Built: _____

Building type (Senior, Family, Mixed): _____

Electricity Metering (check one): Individually-Metered / Master-Metered

Gas Metering (check one): Individually-Metered / Master-Metered

Primary hot water fuel type: _____

Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.): _____

Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.): _____

Total Sq. Ft.: _____ Common Area Sq. Ft.: _____ # of Buildings: _____

of Elevators: _____ # of Floors in each building: _____ # of units: _____

of Bedrooms: 1: _____ 2: _____ 3: _____ 4: _____

Past Energy-Efficiency Work Completed (select all that apply and implementation year- write N/A if not applicable):

<i>Energy-Efficiency Improvement</i>	<i>Year implemented</i>
<input type="checkbox"/> ENERGY STAR Homes Certification	
<input type="checkbox"/> Multifamily High Rise	
<input type="checkbox"/> Pay for Performance	
<input type="checkbox"/> Home Performance with Energy Star	
<input type="checkbox"/> LEED	
<input type="checkbox"/> Enterprise Green Communities	
<input type="checkbox"/> Windows	
<input type="checkbox"/> Lighting	
<input type="checkbox"/> Other (please describe)	

Please include all types of energy used. Complete additional forms as needed when utility information differs by building.

METER INFORMATION

Electric Utility Name: _____

Account Number(s): _____

Natural Gas Utility Name: _____

Account Number(s): _____

Fuel Oil Utility Name: _____

Account Number(s): _____

Other Meters-not including water or sewer (e.g. Renewable Energy, Propane, Cogeneration):

Utility Name & Account Number(s): _____

Utility Name & Account Number(s): _____

Utility Name & Account Number(s): _____

BUILDING SYSTEM CHARACTERISTICS:

Please check all that apply:

Heating System Type:

- Furnace
- High Efficiency Condensing Furnace
- High Efficiency Condensing Burner
- Hot Water Boiler
- Steam Boiler
- Heat Pump
- High Efficiency Variable Heat Pump
- Ground Source Heat Pump
- Packaged Terminal Air Conditioner (PTAC) Unit
- Cogeneration (CHP)
- Special Description:

Cooling System Type:

- Chiller
- Wall Unit (in each Apt.)
- Cooling Tower
- Window Unit (in each Apt.)
- Compressor (mini-split)
- Compressor (ducted)
- Ground Source Heat Pump
- Packaged Terminal Air Conditioner (PTAC) Unit
- Special Description:

Unit Appliances

- Clothes Dryer Type:
Electric _____ Gas _____
- Stove Type: Electric _____ Gas _____
- Hot Water Heater: Electric _____ Gas _____

Building type:

- Wood or steel frame
- Solid Concrete
- Masonry
- Modular
- Structurally insulated panels (SIPS)
- Other type:

Optional:

- Wood or steel frame
- Solid Concrete
- Masonry
- Modular
- Structurally insulated panels (SIPS)
- Other type:

Building Owner Utility Release Form

Authorization for NJHMFA to Receive Customer Utility Data

Date: _____

To Whom It May Concern:

By signing this release form, the property owner (Owner) grants the New Jersey Housing and Mortgage Finance Agency (NJHMFA) and its designee, a consultant for this initiative, permission to access utility data information for the past one (1) year of (if applicable) and for the following three (3) years from this date for the development/building referenced below. The utility data includes energy consumption, energy demand, energy cost, as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the development and building listed below and account(s) listed on the following page(s), totaling ____ pages, and represent and warrant that I have full authority to execute this release form on behalf of the Owner. Owner understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include this development's name or address. Owner understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Owner understands that each applicable utility provider (Utility) reserves the right to verify this authorization request.

Owner authorizes the Utility to release the requested information on Owner's account or facilities to the NJHMFA or its designee. Owner hereby releases, holds harmless, and indemnifies the NJHMFA and the Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee.

Sincerely,

Authorized Representative (signature)

Please print clearly.

Authorized Representative Name: _____

Development Name: _____

Building Service Address: _____

Development Contact: _____

Mailing Address: _____

Phone: _____ Email: _____

Tenant Utility Release Form

Authorization for NJHMFA to Receive Customer Utility Data

Date: _____

To Whom It May Concern:

By signing this release form, the tenant (Tenant) grants the New Jersey Housing and Mortgage Finance Agency (NJHMFA) and its designee (a consultant for this initiative) permission to access utility data information for the past one (1) year of (if applicable) and for the following three (3) years from this date for the unit referenced below. Utility data includes energy consumption, energy demand, energy cost as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the unit and account(s) listed below and represent and warrant that I have authority to execute this release. Tenant understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include tenant's information or this development's name or address. Tenant understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Tenant understands that each applicable utility provider reserves the right to verify this authorization request.

Tenant authorizes the Utility to release the requested information on Tenant's account to the NJHMFA or its designee. Tenant hereby releases, holds harmless, and indemnifies the NJHMFA and Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee. Tenant understands that he/she may cancel this authorization at any time by submitting a written request to both the Utility and NJHMFA.

Sincerely,

Authorized Representative (Tenant signature) _____

Please print clearly.

Representative name: _____

Development Name: _____

Building Address: _____

Unit Number: _____ Number of Bedrooms in Unit: _____

Please list utility provider(s) and account number(s):

ELECTRIC UTILITY: _____ ACCOUNT #: _____

GAS UTILITY: _____ ACCOUNT #: _____

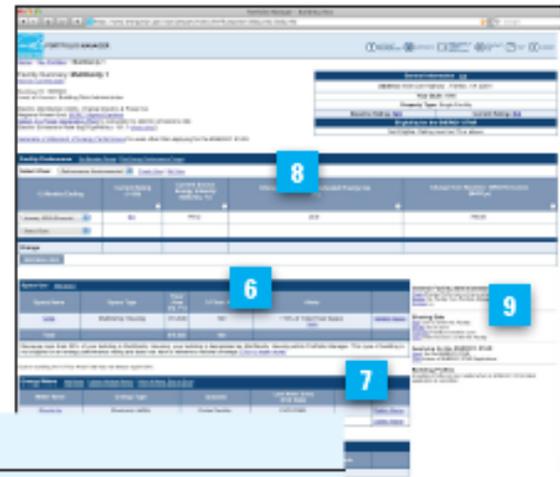


PORTFOLIO MANAGER - QUICK REFERENCE GUIDE

MULTIFAMILY HOUSING

Tracking Your Energy Performance

Portfolio Manager is an online, interactive energy management tool that allows you to measure and track your building's energy and water consumption, identify investment priorities, and verify improvements over time. Multifamily housing communities can use Portfolio Manager to track weather-normalized energy use intensity (EUI), energy costs, greenhouse gas emissions, and water consumption.



USE PORTFOLIO MANAGER STEP-BY-STEP

STEP	ACTIVITY	ACTION																		
1	Access Portfolio Manager	www.energystar.gov/benchmark																		
2	Access your account <ul style="list-style-type: none"> Create a new account Login to an existing account 	<ul style="list-style-type: none"> Click REGISTER. Enter user name and password and click LOGIN. 																		
3	Review system updates and enter your account	Click ACCESS MY PORTFOLIO.																		
4	Add a new facility	Click ADD a Property.																		
5	Select property type and enter general facility information <div data-bbox="232 1140 574 1293" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Property Type</p> <p>What type of property is this building?</p> <ul style="list-style-type: none"> <input type="radio"/> A single facility for which no separate owner manages 10% or more of the floor area. <input type="radio"/> A portion of a single facility for which separate owner or management manages 10% or more of the floor area. <input type="radio"/> A campus comprised of single facilities on adjacent lots. <input type="radio"/> A campus with separate management or metering systems and distribution utility. <input type="radio"/> A campus or other collection of multiple facilities at the same geographic location. (Help) <p style="text-align: right;"><input type="button" value="Previous"/> <input type="button" value="Continue"/></p> </div>	From the "Add a Property" screen, most users will select "A single facility for which my organization owns or manages 90% or more of the floor area." This is the case even for garden or townhouse properties with multiple buildings. Only select the last option ("A campus or other collection of multiple facilities at the same geographic location") if you have multiple multifamily buildings, all on the same master meter. Click CONTINUE, enter General Facility Information, and then click SAVE.																		
6	Enter space use data <div data-bbox="139 1394 651 1503" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <table border="1"> <thead> <tr> <th>Space Name</th> <th>Space Type</th> <th>Floor Area (sq. ft.)</th> <th>% Floor Area</th> <th>Area</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>Multifamily Housing</td> <td>474,884</td> <td>100%</td> <td>100% of Total Floor Space</td> </tr> <tr> <td>Total</td> <td></td> <td>474,884</td> <td>100%</td> <td></td> </tr> </tbody> </table> <p><small>Remember that 90% of your building's (multifamily) housing, your building's designated as multifamily housing within Portfolio Manager. This type including residential for an owner-occupied with residential use residential use residential use. (Click a link to learn more.)</small></p> </div>	Space Name	Space Type	Floor Area (sq. ft.)	% Floor Area	Area	001	Multifamily Housing	474,884	100%	100% of Total Floor Space	Total		474,884	100%		Go to "Space Use" section and click ADD SPACE. <ul style="list-style-type: none"> Enter a facility name. In the "Select a Space Type" menu, select "Multifamily Housing." Enter an effective date. Click CONTINUE. Enter space data. Enter total gross square footage (including both common area and apartment space) even if you are only entering common area energy data. The other space use questions are voluntary, but it is highly encouraged to enter optional space use information. Click SAVE. 			
Space Name	Space Type	Floor Area (sq. ft.)	% Floor Area	Area																
001	Multifamily Housing	474,884	100%	100% of Total Floor Space																
Total		474,884	100%																	
7	Enter energy use data <div data-bbox="139 1602 651 1703" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <table border="1"> <thead> <tr> <th>Meter Name</th> <th>Energy Type</th> <th>Location</th> <th>Unit Number</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>Electricity</td> <td>Electricity - Grid (Residential/Commercial/Industrial)</td> <td>Entire Facility</td> <td>00000000</td> <td>01/01/2010</td> <td>01/01/2010</td> </tr> <tr> <td>Heating/Cooling</td> <td>Heating/Cooling (Gas)</td> <td>Entire Facility</td> <td>00000000</td> <td>01/01/2010</td> <td>01/01/2010</td> </tr> </tbody> </table> </div>	Meter Name	Energy Type	Location	Unit Number	Start Date	End Date	Electricity	Electricity - Grid (Residential/Commercial/Industrial)	Entire Facility	00000000	01/01/2010	01/01/2010	Heating/Cooling	Heating/Cooling (Gas)	Entire Facility	00000000	01/01/2010	01/01/2010	Go to "Energy Meters" section and click ADD METER. <ul style="list-style-type: none"> Enter meter name, type, and units. Click SAVE. Enter number of months and start date. Click CONTINUE. Enter energy use and cost. Click SAVE. Repeat for all energy meters and fuel types.
Meter Name	Energy Type	Location	Unit Number	Start Date	End Date															
Electricity	Electricity - Grid (Residential/Commercial/Industrial)	Entire Facility	00000000	01/01/2010	01/01/2010															
Heating/Cooling	Heating/Cooling (Gas)	Entire Facility	00000000	01/01/2010	01/01/2010															
8	Set metering configuration	Underneath the "Energy Meters" section, click SET METERING CONFIGURATION. <ul style="list-style-type: none"> Select appropriate option from radio button list. Click SAVE. See Features section for additional guidance. 																		
9	Review and interpret results	Go to "Facility Performance" section and review your results. More information is provided on pages two and three of this guide.																		
10	Manage account	Share data and perform other administrative tasks.																		

www.energystar.gov/benchmark