

## **Steps for Benchmarking Service Providers**

### **Hiring a Benchmarking Service Provider**

The EPA has a list of the most active service providers that benchmark properties through Portfolio Manager at this link: [List of most active service and product providers | Buildings and Plants | ENERGY STAR](#)

The New York City Housing Development Corporation (HDC) and the Department of Housing Preservation and Development (HPD) have also published a short list of firms that are pre-qualified for benchmarking City-financed properties on the NYC HPD Benchmarking page: [Benchmarking Protocol - HPD \(nyc.gov\)](#)

Please note that these lists are not exclusive, and you may select a qualified service provider of your choosing.

### **Role of Benchmarking Service Providers**

1. Create a Portfolio Manager account for the property and populate the account with the necessary physical characteristics (number of units, building size, etc.). Automatically connect to your utility accounts and populate with monthly energy usage and cost data from previous full calendar year.
  - a. Monthly usage data should include, but not be limited to: all fuel usage (oil, gas, electricity, steam) and water for **all building** utilities (**owner-paid and resident-paid**) and the respective costs for each utility. If resident-paid utility usage cannot be obtained, you may provide owner-paid usage data only.
    - i. Some utility data may not be billed monthly (such as fuel oil, propane, and water) but should still be included in the data submission in the manner it is billed.
    - ii. If whole building utilities were acquired: under the “Metered Areas” data field in Portfolio Manager, select “Total energy (or water) consumption for the whole building”
    - iii. If only owner-paid utilities were acquired: “Consumption for common areas only”
    - iv. Use the “Notes” data field to explain any unique situations, or contact the sustainability team ([hcr.sustainability@hcr.ny.gov](mailto:hcr.sustainability@hcr.ny.gov) if you have any questions
    - v. If cost data is not available or cost effective to collect it can be omitted.
2. Perform quality assurance checks on the data to ensure all necessary energy and water data is included in the Portfolio Manager account.
3. **Ensure that the HCR HID # is entered into the Custom 2 data field. The HCR HID # can be found on the Covered Buildings List (CBL) published on the HCR website.**
4. Data is due into the energy star portfolio manager link by May 1<sup>st</sup> each year.
5. Complete the property intake form required with HCR ID # on the CBL.

QUESTIONS? Send an email to [hcr.sustainability@hcr.ny.gov](mailto:hcr.sustainability@hcr.ny.gov)