

Energy Benchmarking and Reporting Checklist

Montgomery County passed a Building Energy Benchmarking Law in April 2014. To comply with the Law, building owners can use this reporting checklist, a step-by-step summary of how to benchmark, report data to the County annually, and comply with the Law. For more information and resources, visit the County's Benchmarking website: bit.ly/depbenchmarking.

- Identify and assign a point person** who will be responsible for compliance with the Benchmarking Law.
- Collect data on the building's energy use for calendar year 2016.** This may include electricity, natural gas, steam, chilled water, fuel oil, or other fuel sources. Reporting water data is not required. Your utility company can provide whole-building energy data (tenant authorization may be required, so plan ahead).
- Create an account and properties in EPA's Portfolio Manager**, a free, online tool to measure, track, and report your energy use. Go to: energystar.gov/PortfolioManager.
- In Portfolio Manager, add your property**, and follow the prompts to enter information on building characteristics, such as gross square footage and operating hours. If you don't have this information, you may need to request it from your tenants. Use EPA's Benchmarking Starter Kit: bit.ly/EPAstart.
- In Portfolio Manager, add your energy data** by setting up the appropriate meters and entering the fuel data. *Tip:* You can enter your utility bills manually or upload a spreadsheet provided by your utility company. Some energy management tools may allow you to upload data directly to Portfolio Manager.
- Enter your building's 8-digit Parcel/Tax ID** as your Montgomery County Building ID (MBID) in the Unique Identifiers section of your Portfolio Manager property record.
- Run Portfolio Manager's built-in tool to check for possible data errors** for calendar year 2016 data before reporting to the County and resolve any alerts.
- Complete verification of your building characteristics and calendar year 2016 energy data** by having a "recognized data verifier" use Portfolio Manager's Data Verification Checklist as a guide. *Note:* Verification is required for the first year of compliance, and every three years after.
- Enter the recognized data verifier credentials in Property Details field**, including full name, credentials, credential ID, and contact information (*or* the month and year of your ENERGY STAR certification for alternative compliance). You may also use this field to report any contextual information about your building that you wish to be disclosed.
- Submit covered building data using DEP's Data Request through Portfolio Manager.** The Data Request link for calendar year 2016 reporting is available on the County's Benchmarking website: bit.ly/depbenchmarking. Follow the step-by-step instructions, preview your report, e-sign the data submission, and then click "Send Response" to submit data to the County.
- Retain the auto-generated confirmation email** you will receive from Portfolio Manager, as well as the signed Data Verification Checklist from your recognized data verifier and any other related records.

If you have any questions about the Benchmarking Law, contact the Montgomery County Department of Environmental Protection at energy@montgomerycountymd.gov.



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