

# Official Guide for Building Energy Benchmarking in Montgomery County

A step-by-step guidance document for complying with  
the County's Benchmarking Law

December 2017



DEPARTMENT OF  
**ENVIRONMENTAL  
PROTECTION**  
MONTGOMERY COUNTY • MARYLAND

# Official Guide for Building Energy Benchmarking in Montgomery County

This guide provides background information and step-by-step instructions to help Montgomery County building owners comply with the Building Energy Benchmarking Law.

If you need additional assistance, please contact Montgomery County’s Department of Environmental Protection at [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).

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## Quick Resources

Join the Montgomery County Benchmarking Google Group and be a part of the discussion: [bit.ly/MoCoGoogleForum](https://bit.ly/MoCoGoogleForum)

Sign up for the monthly Commercial Energy News e-newsletter: [bit.ly/MoCoBBNews](https://bit.ly/MoCoBBNews)

Use ENERGY STAR’s Benchmarking Starter Kit: [bit.ly/EPAstart](https://bit.ly/EPAstart)

For questions about complying with the County’s Benchmarking Law, contact DEP at [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).

For questions about using Portfolio Manager, contact EPA directly at [buildings@energystar.gov](mailto:buildings@energystar.gov).

Additional resources and forms are available at the County’s Benchmarking website: [bit.ly/bbmontco](https://bit.ly/bbmontco)

### Benchmarking and Reporting Checklist

- 1** Identify a point person responsible for compliance
- 2** Collect annual energy use data for your building
- 3** Create a user account in EPA’s Portfolio Manager
- 4** Add your Covered building(s) to your account
- 5** Add your monthly energy data
- 6** Enter your Montgomery County Building ID
- 7** Check for data errors with Portfolio Manager’s built-in tool and correct any issues
- 8** Verify data with EPA’s Data Verification Checklist the 1<sup>st</sup> year and every 3<sup>rd</sup> year thereafter
- 9** Enter Recognized Data Verifier credentials
- 10** Report benchmarking data by June 1<sup>st</sup> to DEP using the reporting link for that year
- 11** Retain the auto-generated confirmation email

See the full checklist at: [bit.ly/DEPBBChecklist](https://bit.ly/DEPBBChecklist)

## About the Benchmarking Process and Benchmarking Law Requirements

**What is Energy Benchmarking?** Energy Benchmarking means tracking a building's energy use and using a standard metric to compare the building's performance against past performance and to its peers nationwide.

**What are the Benefits?** Benchmarking improves our understanding of energy consumption patterns; quantifies energy performance to compare against past performance and other similar buildings; helps identify energy saving opportunities within a portfolio of buildings; and manages business bottom line through consistent data collection and tracking. Read more about the [Benefits of Benchmarking](#).

### Summary of the Benchmarking Law

In May 2014, Montgomery County adopted [Bill 2-14, Environmental Sustainability – Buildings – Benchmarking](#) and amended the original legislation by [Bill 35-15 Environmental Sustainability – Benchmarking – Amendments](#) in November 2015, which requires the County and commercial building owners to:

- Benchmark the energy use of their nonresidential buildings located in Montgomery County, MD that are 50,000 square feet and greater in EPA's ENERGY STAR® Portfolio Manager®,
- Have those data verified by a Recognized Data Verifier the first year of reporting and every third year thereafter, and
- Report data to the County by June 1<sup>st</sup> annually for public disclosure.

The County has led by example by benchmarking its buildings first by June 1, 2015. The first deadline for private buildings was June 1, 2016. Public and private commercial buildings must continue to benchmark and report data by June 1<sup>st</sup> each year. The [Department of Environmental Protection \(DEP\)](#) is responsible for the implementation of this Law.

## Covered Buildings and Deadlines

### What is a Covered Building?

A building covered under the Benchmarking Law is “any nonresidential building, or any group of buildings that have the same property identification number” that meet the square footage thresholds for the respective groups (“Group 1” or “Group 2”).

Special Cases:

- *Multiple Buildings that Share a Parcel/Tax ID:* If you have a complex of buildings that share a property identification number (your Parcel ID, Tax ID, MBID, or property tax account number), and their total square footage adds up to the thresholds in the table on the next page, they are considered Covered under this Law (e.g., office campus with two buildings that are 30,000 square feet each and share a Tax ID).
- *A Building on Multiple Parcels:* If you have a building that meets the thresholds, regardless of how many parcels or tax IDs or owners, the building is also considered Covered under this Law (e.g., shopping mall).

### Covered Building Groups and Deadlines

There are three groups of Covered buildings required to benchmark annually under the Benchmarking Law in Montgomery County:

Covered Building Group	Building Size (Total Square Footage of Building or Group of Buildings)	First Calendar Year of Data Reported to DEP	First Deadline
County Facilities	50,000 square feet and greater	2014	June 1, 2015
Group 1	250,000 square feet and greater	2015	June 1, 2016
Group 2	50,000 square feet up to 250,000 square feet	2016	June 1, 2017

Benchmarking Task to Complete	Deadline Each Year
Request any data needed to benchmark your building from your tenants	March 31
Collect data responses from tenants	April 30
Submit waiver and application forms to DEP, if applicable	May 1
Request requests to your utility company for aggregated data	May 1
Submit benchmarking data to the County by using the reporting link on DEP's website	June 1

### Covered Building Inventory

DEP developed a Covered Buildings Inventory to raise awareness about the Benchmarking Law. This preliminary list of private buildings covered under the Law was created with current Maryland tax assessment records and the CoStar commercial building database.

Building owners can find [the most current version of the Private Covered Buildings Inventory on DEP's Benchmarking Website](#). When accessing the Covered Buildings Inventory, make sure to read the accompanying document, [Important Information about the Covered Buildings Inventory \(PDF, 358 KB\)](#).

Note: This inventory is an approximation, meant to raise awareness about the Law and help identify the buildings covered by the Law. Each building owner needs to confirm their own building square footage to determine coverage under the Law.

Compliance is dependent upon the building owner's record of their building square footage and the square footage on the parcel in total, regardless of the information on the Covered Building Inventory. This inventory will be used only as a tool by DEP, and should be considered the same by building owners and other stakeholders. DEP looks forward to developing a more accurate building database throughout the initial reporting years.

Any errors in the Covered Buildings Inventory should not be reported to DEP, but rather to the original source of the data. Issues with CoStar data should be reported to [CoStar](#) for correction (1-800-613-1303 or [support@costargroup.com](mailto:support@costargroup.com)). Issues with the Tax Assessment data should be brought to the attention of the [Maryland Tax Assessor](#).

## Montgomery County Building ID (MBID)

### What's an MBID Number?

Your building's Montgomery County Building ID is your 8-digit Parcel Identification Number/Tax ID. The Parcel ID number can be found in the upper right corner of your property tax bill. It is the same as your property tax account number.

You can also locate this number online by visiting the Department of Finance's [Real Property Tax Account Information website](#). DEP's Covered Building Inventory is also available to verify your MBID number.

### Entering MBID Numbers in Portfolio Manager

To be sure your building is counted as compliant by DEP, you will need to enter an additional ID number specific to Montgomery County in Portfolio Manager.

To enter your MBID number:

- Under the Details tab, you will find a number of fields for ID numbers in the Unique Identifiers box.
- Under the "Standard IDs" section, you'll select "Montgomery County, MD Building ID (MBID)" from the drop-down menu.
- Enter your building's 8-digit Parcel Identification Number/Property Tax Account Number as your MBID.

Unique Identifiers (IDs)

Portfolio Manager ID:  
4127275

Custom IDs: None

Standard IDs: [1 view](#)

You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross reference your property in other systems.

[Edit](#)

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

ID:

[+ Add Another](#)

[Save](#) [Cancel](#)

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

ID:

[+ Add Another](#)

[Save](#) [Cancel](#)

Special cases:

- If you have multiple buildings on your parcel, you'll create your MBID by using the 8-digit Parcel Identification Number/Tax ID number and adding an underscore and lower-case letters in alphabetical order beginning with "a" after the MBID number for each building you are benchmarking in Portfolio Manager (e.g., 01234567\_a, 01234567\_b).
- If you have a building on multiple parcels, you must list each 8-digit Parcel Identification Number/Tax ID number as your MBIDs, separating each with a comma.



## Exemptions and Waivers

### Exemptions

Buildings exempt from the Law include any County building, Group 1 Covered building or Group 2 Covered building with more than 10% of total building square footage which is used for:

- Public assembly in a building without walls,
- Warehousing,
- Self-storage, or
- A use classified as manufacturing and industrial or transportation communication, and utilities.

### Waivers

Building owners can request waivers in the cases where the Covered building:

- Is in financial distress, defined as the building is subject of a tax lien sale or public auction due to property tax arrearages; is controlled by a court-appointed receiver; or was recently acquired by a deed in lieu of foreclosure;
- Had average physical occupancy of less than 50% throughout the calendar year for which benchmarking is required; or
- Is new construction and received its certificate of use and occupancy during the calendar year for which benchmarking is required.

### Applying for an Exemption or Waiver

If your commercial buildings would like to request an exemption or waiver for a specific calendar year, building owners must submit a [Building Exemption/Waiver Application \(PDF, 107 KB\)](#) along with supporting documentation to DEP no later than **May 1** of each deadline year.

**Note:** Use one form per building per calendar year. Submit any relevant supporting documentation along with this application to justify the exemption/waiver to [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov). Exemptions and waivers must be reviewed and approved by DEP; DEP will return a signed copy of the form for your records.

## Collecting Building Characteristics and Energy Data

### Building Characteristics Information to Collect

Building owners will need certain building characteristics data to create a property record in Portfolio Manager. You can either follow the prompts built into Portfolio Manager or you may use the Montgomery County version of the Portfolio Manager Data Collection Worksheet to pre-assemble your information. [Montgomery County Data Collection Template](#) (MS Word, 96 KB).

You may need to contact your building tenants to obtain complete information about your building characteristics before entering data into Portfolio Manager. Building owners must request any space data needed in writing to the tenant no later than **March 31** of each compliance year. Tenants must respond within 30 days of a request, per the Benchmarking Law. Using this template is not required and is meant only as a guide. [Tenant Information Request Letter Template](#) (MS Word, 99 KB).

## Gather Covered Building Energy Data

You will need whole-building energy data for all your meters to benchmark properly in Portfolio Manager. Energy data include electricity, natural gas, steam, chilled water, fuel oil, or other fuel sources used at the property.

*Reminder:* you are not required to benchmark or disclose water or waste/materials data or utility costs under the County's Benchmarking Law.

There are two ways to gather your energy data needed for benchmarking:

1. Collect your utility bills/invoices:

- If you are the account holder of all your meters and all your energy data are available to you, we recommend collecting your bills for manual input. (Portfolio Manager provides a bulk-upload option to easily upload multiple meters at the same time using an Excel spreadsheet template.)
- If you have tenants, you can request that they share/send their energy data to you for the purposes of benchmarking. Or, read below for information on requesting data from your utility/utilities directly.

2. Request energy data electronically from your utility company: If you have multiple meters in your building, it is possible to request whole-building/aggregate data from your utility for benchmarking purposes. This service is most beneficial to building owners with several buildings and 5 or more meters in each building, particularly where tenants pay the utility bills.

- If you have **5 or more meters**, you can usually request whole-building/aggregated data without tenant authorization.
- If you have **4 or fewer meters**, you can request data from your utility but must obtain authorization from tenants to obtain their energy data. Building owners will need to receive written authorization from each tenant.

## When to Request Utility Data

Utilities may take up to 30 business days to provide your energy data but typically process requests within 10 business days; the wait can be longer as we approach compliance deadlines. DEP encourages building owners to request their data no later than **May 1** of each compliance year.

## Utility-Specific Information

Utilities serving Montgomery County have systems in place to assist building owners with complying with the Benchmarking Law:

- **BG&E** (electricity) offers information on getting electronic, aggregated data at [Automated Benchmarking](#).
- **Pepco** (electricity) customers can find information on getting their electronic, aggregated data at [Pepco Energy Benchmarking](#).

- Pepco’s Resource Advisor tool allows you to access electronic electricity consumption data using account and/or meter numbers and have it automatically loaded to Portfolio Manager every month. Building owners can learn more about the Resource Advisor tool by reviewing the [overview document](#) and [fact sheet](#).
- **Potomac Edison** (electricity) – Account holders can either call customer service at 1-800-686-0011 to request and receive up to 2 years of historical monthly data via postal mail OR account holders can log-in to their account on the [First Energy website](#) and retrieve their data this way. Only account holders can request utility data.
  - **Note:** If the account holder is a tenant, they will need to request their data and provide it to their building owner.
- **Washington Gas** (natural gas) customers with 5 or more meters can find information on getting electronic, aggregated data at [Washington Gas Energy Benchmarking](#) and set up a [Utility benchmarking portal account](#).

## Benchmarking in Portfolio Manager

To streamline the process of benchmarking, the Benchmarking Law identifies U.S. EPA’s free, industry-standard ENERGY STAR Portfolio Manager Tool as the recognized software for benchmarking and reporting. Read about it at [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark). Building owners must use Portfolio Manager for benchmarking and reporting; other benchmarking tools cannot be used to comply with the Benchmarking Law.

There are two methods for getting your building benchmarked:

### Method 1: Do-It-Yourself Benchmarking

Portfolio Manager is built to be user-friendly and accessible for in-house staff to benchmark their buildings. In many cases, ENERGY STAR has found accounting, operations, and building management staff are entering data into Portfolio Manager. If you choose to Do-It-Yourself, below are some helpful tools to guide you:

- [Portfolio Manager Quick Start Guide](#) (PDF, 508 KB) offers the basics to setting up your Portfolio Manager account, including adding your property, entering your energy data, and seeing your results.
- [Details on Entering Your Utility Bill Data](#) (PDF, 567 KB) walks you through the steps to set up a meter and correctly enter data, add data to an existing meter, complete spreadsheet uploads, and information on Web Services (automated benchmarking).
- [Portfolio Manager Trainings](#) offers both live and recorded webinars, written and video tutorials, and how-to guides for specific functions of the software.
- [Portfolio Manager Technical Support](#) offers advice and guidance on how to benchmark your building(s) in Portfolio Manager. Here, you can search existing FAQs or ask a question.



## Method 2: Hire an Energy Service Company to Benchmark

Benchmarking is a common and regular practice for any energy efficiency or conservation project. In Montgomery County and around the region, there are many energy service companies that offer an array of services to help you manage your energy use. Many of these same companies are experienced in benchmarking and can help you benchmark your building.

### How to Find an Energy Service Company

DEP does not endorse a particular company or business, but we can direct you to existing lists of energy service companies that do similar work:

- Trade Ally Programs offer a list of companies that assist utilities with energy efficiency improvements, many of which also offer benchmarking services:
  - [Pepco Trade Ally Program](#)
  - [BGE Service Providers](#)
  - [Potomac Edison Trade Ally Program](#)
- [ENERGY STAR Licensed Professional Finder](#) can help you find local Licensed Professionals that have verified properties near you for ENERGY STAR certification. This directory is updated quarterly.
- [ENERGY STAR Service & Product Providers \(SPPs\)](#) have demonstrated their expertise and achievements by meeting strict ENERGY STAR program requirements for benchmarking customer buildings using Portfolio Manager and gaining ENERGY STAR certification for buildings.
- [ENERGY STAR Partners](#) have made a commitment with ENERGY STAR to support benchmarking and improving building energy performance.
- Montgomery County [Benchmarking Ambassadors](#) ([PDF, 311 KB](#)) attended a special 3-hour "train-the-trainer" taught by EPA ENERGY STAR Portfolio Manager staff, got the details about complying with Montgomery County's Law, and learned how to access data from utilities.

DEP cannot endorse any specific company or business, but we recommend asking a few companies about their experience for benchmarking, ability to help deliver energy savings, and other services they offer. You can ask for quotes from multiple companies, and they may be able to help you benchmark and improve your building's energy performance.

## Data Verification

Verification is considered an industry best practice, and ensures that building and energy data entered into Portfolio Manager are accurate. The purpose of verification is to enhance the quality of data being reported collectively through the Benchmarking Law. Verification requires a second pair of eyes from someone with knowledge about Portfolio Manager and building energy performance.

The Benchmarking Law requires that building owners complete a verification process the first year of reporting and every 3 years after.

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Additional information can be found in DEP’s [How-to Guide for Data Verification](#) (PDF, 160 KB).

<b>Montgomery County Benchmarking Law Reporting Cycle</b>						
<b>Building Group</b>	<b>CY 2014 Data</b>	<b>CY 2015 Data</b>	<b>CY 2016 Data</b>	<b>CY 2017 Data</b>	<b>CY 2018 Data</b>	<b>CY 2019 Data</b>
County Buildings	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report
Group 1 (250,000 SF+)		Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Verify, Report
Group 2 (50,000 SF up to 250,000 SF)			Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report

**Who can Complete Verification?**

Building owners must demonstrate that reported benchmarking information is verified by a “Recognized Data Verifier”—a person who holds a current credential recognized by DEP. This person can be in-house staff or from a third-party firm. The following is a list of credentials that DEP has identified as acceptable to be a Recognized Data Verifier:

<b><u>Verification Credential</u></b>	<b><u>Institution / Association</u></b>
Professional Engineer ( <a href="#">PE</a> )	National Society of Professional Engineers
Licensed Architect	National Council of Architectural Registration Board
Registered Architect (RA)	American Institute of Architects (AIA)
Certified Energy Manager ( <a href="#">CEM</a> )	Association of Energy Engineers (AEE)
Certified Energy Auditor ( <a href="#">CEA</a> )	AEE
Certified Building Commissioning Professional ( <a href="#">CBCP</a> )	AEE
Certified Measurement and Verification Professional ( <a href="#">CMVP</a> )	AEE
Existing Building Commissioning Professional ( <a href="#">EBCP</a> )	AEE
LEED – Professional with specialty in Building Operations + Maintenance ( <a href="#">LEED-AP O+M</a> )	US Green Building Council (USGBC)
<a href="#">LEED-Fellow</a> – For outstanding APs	USGBC
Building Energy Assessment Professional ( <a href="#">BEAP</a> )	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)

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<b><u>Verification Credential</u></b>	<b><u>Institution / Association</u></b>
Building Energy Modeling Professional ( <a href="#">BEMP</a> )	ASHRAE
Commissioning Process Management Professional Certification ( <a href="#">CPMP</a> )	ASHRAE
Operations & Performance Management Professional ( <a href="#">OPMP</a> )	ASHRAE
Certified Commissioning Professional ( <a href="#">CCP</a> )	Building Commissioning Association (BCA)
Associate Commissioning Professional ( <a href="#">ACP</a> )	BCA
Sustainability Facility Professional ( <a href="#">SFP</a> )	International Facilities Management Association (IFMA)
Certified Facility Manager ( <a href="#">CFM</a> )	IFMA
RPA/FMA High Performance Designation ( <a href="#">RPA/FMA-HP</a> )	Building Owners and Managers Institute (BOMI) International
Systems Maintenance Technician ( <a href="#">SMT</a> )	BOMI International
Systems Maintenance Administrator ( <a href="#">SMA</a> )	BOMI International
Real Property Administrator ( <a href="#">RPA</a> ) with caveat requirements <sup>1</sup>	BOMI International
Certified Property Manager ( <a href="#">CPM</a> ) with caveat requirements <sup>2</sup>	Institute of Real Estate Management (IREM)

### How to Complete Verification

The Recognized Data Verifier should review the Data Verification Checklist generated in Portfolio Manager (*available under the Reports Tab, in the top right box*) and confirm the building profile information and energy meter data. The required verification does not include a review of water metrics, waste data, or indoor air quality—nor does it require a site visit.

The Recognized Data Verifier must complete and sign Data Verification Checklist and give it to the building owner. This signed Verification Checklist does not need to be submitted to DEP unless it is requested (as authorized by the legislation). Therefore, building owners must retain the most recent signed Data Verification Checklist for at least three years.

<sup>1</sup> RPA must have been achieved with the elective course, Asset Management OR achieved with completion of at least 3 of the 5 [Sustainability/High Performance Experience Criteria](#). Submit documentation to [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).

<sup>2</sup> CPM must have been achieved with the following three functions selected and illustrated in the [Experience Form](#): #3, #30, and #33. Submit documentation to [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).

## How to Report Verification to DEP

Once verification is completed, the building owner must enter the following details about the Recognized Data Verifier in the Property Notes field on the Details tab for each Covered building in Portfolio Manager (see example below):

- Full Name
- Credential (name/acronym)
- Credential identifier (ID number, state of issue)
- Contact information (verifier's email address and phone number)

### Property Notes

Use the following area to keep notes on your property.

2016 benchmarking data for this property was verified by: John Smith, PE, Maryland, 01234, john.smith@county-verified.us, 240-555-1234

Enter Recognized Data Verifier credentials in the Property Notes field on the Details tab.

You have 866 characters remaining for your notes.

Last updated: 8/08/2016 3:16 PM EDT

Save Notes

Remember to save!

## Alternative Verification Path

Alternatively, Covered buildings can meet the verification requirement if the owner can demonstrate that the building has been awarded the ENERGY STAR building certification from EPA for at least 6 months of the year being benchmarked.

For example, if a Group 2 building receives the ENERGY STAR certification in September 2016, the previous 12 months of energy data were used to earn the certification (October 2015 – September 2016). The ENERGY STAR can be used to satisfy the 2016 verification requirement since the energy data used to earn the ENERGY STAR certification covers more than 6 months of 2016 (January – September 2016 data).

If a building owner is using this verification path for a Covered building, please indicate this in the Property Notes field by stating “ENERGY STAR Certification used for verification” and the month and year certification was achieved.

## Reporting Data to the County

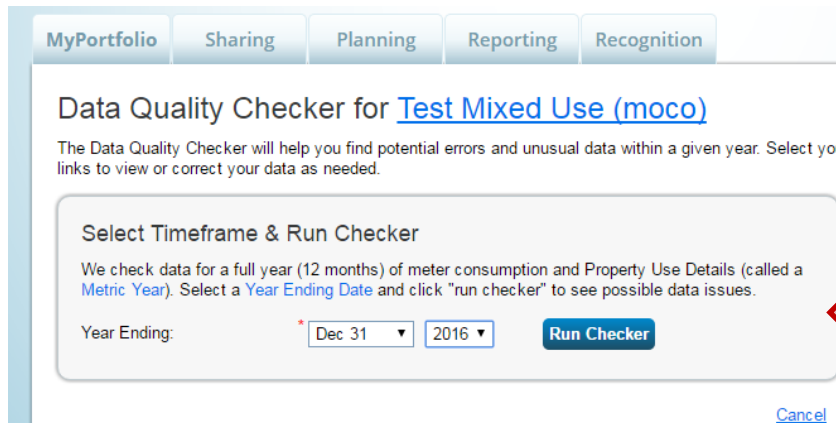
### When to Report

All nonresidential properties in Montgomery County covered under the Benchmarking Law must report benchmarking data to DEP on or before June 1<sup>st</sup> annually. A new reporting link is made available on [DEP's Benchmarking website](#) for each year.

## Before Reporting

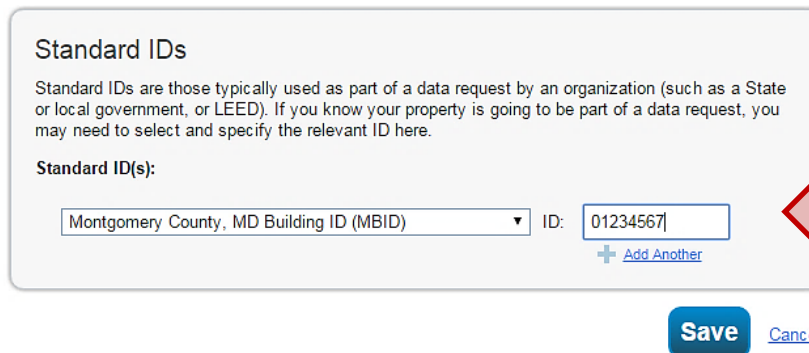
Prior reporting benchmarking data to DEP, be sure you have fulfilled the following requirements:

- Enter all energy, water, and space use information in Portfolio Manager. Enter all data from January 1 – December 31 for the calendar year being reported for each Covered building.
- Run Portfolio Manager’s tool to check for possible data errors prior to submitting data to DEP to ensure that you have no fatal energy errors in your data submission. The Data Quality Checker timeframe should align with December 31<sup>st</sup> of the calendar year being reported. Alerts related to water or waste/material meters can be ignored.



Run the Data Quality Checker for the calendar year being reported.

- Identify your properties with your Montgomery County Building ID (MBID). Under the “Standard ID” section, you’ll select “Montgomery County (MD) Building ID” and enter your building’s 8-digit Parcel Identification Number/Tax ID as your MBID, then click Save.



Enter your MBID number in the Standard ID fields under the Details tab.

If you have multiple buildings on your parcel, you’ll create your MBID by using the 8-digit Parcel Identification Number/Property Tax ID number and adding an underscore and a lower-case letter in alphabetical order beginning with “a”. (e.g., 01234567\_a, 01234567\_b). If you have a building on multiple parcels, you can list each 8-digit Parcel Identification Number/Tax ID number as your MBIDs, separating each with a comma.

- **Please note:** if you are a third-party energy services company, you must receive approval prior to submitting benchmarking data on behalf of a Covered building owner and indicate your client’s information in the “About Your Response” section of the data request.

## How to Report

Reporting to the County is easy once you've completed your benchmarking in Portfolio Manager. DEP will provide a reporting link that will facilitate electronic reporting to the County through Portfolio Manager.

**There will be a new reporting link for each compliance year.** Building owners must use the DEP-provided reporting link to comply with the Law. DEP will not accept data submitted outside of this data request link.

Check the [DEP Benchmarking website](#) or read the [Commercial Energy News](#) emails in the months preceding the June 1<sup>st</sup> deadline for the reporting link for the current reporting year. Follow the steps below to submit your data to the County:

### Step 1: Click the Reporting Link

The reporting link will take you to the ENERGY STAR Portfolio Manager account log-in screen—after logging in, you'll see step-by-step instructions on the Data Request page (see sample screenshot on the next page). DEP recommends taking a screenshot or printing the instructions so you can refer to them later.

MyPortfolio | Sharing | Reporting | Recognition

Complete this form to respond to the "Montgomery County CY 2016 Energy Data for All Covered Buildings (50,000 SF and Greater)" for Montgomery County Department of Environmental Protection. This response has also been added to your "Templates & Reports" list on the Reporting tab.

### Respond to Data Request: Montgomery County CY 2016 Energy Data for All Covered Buildings (50,000 SF and Greater)

from Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection)

**About this Data Request**

Data Requested By: Montgomery County Department of Environmental Protection

Instructions: **Montgomery County Benchmarking Reporting Template for Calendar Year 2016 Data**

**Due: Thursday, June 1, 2017 11:59 pm Eastern**

Please read these instructions—DEP suggests printing these instructions before advancing so you can refer to them later.

Reporting calendar year 2016 energy benchmarking data is required for all buildings 50,000 square feet and greater covered under the law. Reporting is done using the Custom Reporting Template functionality of ENERGY STAR Portfolio Manager.

**Responding to Data Requests**

You are viewing this screen because someone has asked you to provide data to them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions may have been made by the data requestor.)

Also see the [How to Respond to Data Requests](#) guide.

**Please note:** a new reporting link is made available on the DEP Benchmarking website for each reporting year. The link you used to report previous calendar years' data will not be the same as the link you'll use to report future calendar years' data.



### Step 2: Generate the Response Preview

Select the Covered buildings you would like to report to the County and generate the response preview. The timeframe is pre-set for each compliance year and cannot be changed—this allows the County to collect the same date range for all Covered buildings.

If you are an energy service company submitting benchmarking data on behalf of a Montgomery-County-based client, you **must** report that you are submitting data on behalf of someone else. The contact from the drop-down must reflect the building owner information. This also notifies your client that you are submitting data on their behalf to comply with the Law.

The screenshot shows the 'Generate Response Preview' form with two main sections: 'About Your Response' and 'Your Response'. The 'About Your Response' section has a question 'Who is this data being submitted on behalf of?' with radio buttons for 'myself' and 'someone else'. The 'Your Response' section has 'Select Information to Include:' with 'Timeframe:' (Single Year, Dec 31, 2015) and 'Properties:' (One Property, Test Mixed Use (moco)). A blue button 'Generate Response Preview' and a 'Cancel' link are at the bottom. Three red callout boxes with arrows point to specific parts: 'Energy service companies submitting data MUST indicate the building owner contact info here.' points to the 'someone else' radio button; 'This timeframe will be locked for the compliance year of data requested by DEP.' points to the 'Timeframe:' dropdown; 'Select the Covered Buildings to be reported to DEP here.' points to the 'Properties:' dropdown.

### Step 3: Send the Response to DEP

Once you click “Generate Response Preview,” you’ll be directed back to the Reporting tab in Portfolio Manager with an alert message that looks like this:

The screenshot shows the 'Reporting' tab in Portfolio Manager. A green alert box contains the following text: 'A preview for your response to the data request "Montgomery County CY 2016 Energy Data for All Covered Buildings (50,000 SF and Greater)" on behalf of Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection) is being generated. You may view your response preview by selecting "Preview Response" or "Download Preview in Excel" from the action menu below. Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released. Please note that each property you included should have a full 12 months of information for each timeframe. Otherwise, the metrics may not be able to be calculated. When this happens, "N/A" will be displayed in your response.' Below the alert box are links for 'Charts & Graphs' and 'ENERGY STAR Performance Documents'.

**\*\*This green box does not mean you are done with reporting!\*\***

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While the response preview has been generated, you still need to submit the data to DEP. Yes, the green box here can be deceiving!

Scroll down to the Templates & Reports section to send DEP your data by selecting “Send Response” next to the Data Request template name for that calendar year (see sample screenshot on the next page).

Your new response preview(s) has been generated.

Name	Status	Action
Montgomery County CY 2016 Energy Data for All Covered Buildings (50,000 SF and Greater) (Request from Montgomery County Department of Environmental Protection)	Response Preview Generated: 6/30/2017 2:55 PM	I want to... I want to... Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response <b>Send Response</b> Delete Response
Montgomery County CY 2015 Energy Data for County and Group 1 Buildings (Request from Montgomery County Department of Environmental Protection)	No Response Preview Generated	
Energy Performance	Generated: 4/18/2017 3:25 PM	
Respond to Data Request: Montgomery County DEP Benchmarking Law - County and Group 1 Buildings CY 2015 Data (Request from Montgomery County Department of Environmental Protection)	Closed: 1/21/2016 4:02 PM	
Respond to Data Request: Data Request from Montgomery County DEP - Early Reporters CY 2014 (Request from Montgomery County Department of Environmental Protection)	Closed: 1/04/2016 9:37 AM	

Once the response preview is generated, select the “Send Response” action from the drop-down menu.

If your response preview looks like the sample below, **STOP!** Select the “Read More” hyperlink and resolve all energy-related errors before sending any data to DEP.

### Templates & Reports (20)

Create a New Template

Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. [Read more](#)

Name	Status	Action
Montgomery County CY 2016 Energy Data for All Covered Buildings (50,000 SF and Greater) (Request from Montgomery County Department of Environmental Protection)	Response Preview Generated: 6/30/2017 2:57 PM	I want to...
Montgomery County CY 2015 Energy Data for County and Group 1		

If your response preview has warning signs, **STOP!**  
Resolve all errors before submitting data to DEP.

### Step 4: Confirm Submission of the Response to DEP’s Data Request and Send Data

If there are no errors, proceed with sending your data to DEP. Once you select the “Send Response” action, you’ll arrive on the confirmation page (Confirm Response to DEP’s Data Request, see sample screenshot on the next page).

Select any other contacts who should receive a confirmation email, choose what format you’d like to receive for a copy of the submitted data (*DEP recommends selecting Excel, unless you’re able to use an XML formatted file*), and e-sign your response with your username and password before pressing “Send Data.”

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Confirm Response to Data Request from Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection)

By clicking Send Data, you will release data to Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection). 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:

Bill D. Ing (bill@abc.123)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

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 Montgomery County Department of Environmental Protection with Montgomery County Department of Environmental Protection.

Your username:

Your password:

and password) to electronically sign your response.

Add other contacts if you'd like them to receive a copy of the confirmation email (i.e., building owner, green team leader, supervisor).

You'll receive an attachment of the data you submit to DEP. Indicate which format you'd like to receive the data in.

E-sign your response here (Portfolio Manager username and password).

Remember to Send the Data to DEP!

### Step 5: Save the Confirmation Email (and Data Verification Checklist)

After you click "Send Data," retain the auto-generated confirmation email you'll receive from Portfolio Manager, as well as the signed Data Verification Checklist from your recognized data verifier and other records related to the energy reporting process.

DEP will review the data you reported and follow-up with an email confirming your compliance for that calendar year or to resolve any questions or errors with your benchmarking report.

### After Reporting

If you need to make a change after you reported data, but before the deadline, go ahead and make your change and re-report your data to DEP. If it's the same building record in Portfolio Manager, the updated information will automatically replace what is reported to us.

**Please note:** if you make changes in your Portfolio Manager account, DEP does not automatically receive those updates; you must go through the process of sending the data using the Data Request reporting link again (see Steps 1-4 with screenshots in the previous section).

If you need to make updates after the deadline, contact DEP at [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov) so we can be sure to capture your most accurate data.

## Enforcement

The Benchmarking Law is enforceable under Method 2 regulations (including fines for noncompliance), and any violation of the Law is a Class A violation. DEP will send out a Notice of Need to Comply letter followed by a Notice of Violation to any building owner of a Covered building who does not comply with the Law. Note that DEP is available to provide technical assistance and resources to any building owner to help them comply with the Law.

## Disclosure

DEP is requesting information in the Portfolio Manager reporting template to fulfill the Benchmarking Law's reporting requirements and provide helpful information to guide benchmarking and energy efficiency program and policy planning. As such, DEP will be collecting a broader set of data than will eventually be disclosed. Except for metrics listed below under "What is disclosed?", DEP will not disclose the otherwise collected data for individual buildings. The collected data will be used to provide aggregate metrics and portfolio-wide benchmarks for reporting purposes.

The Benchmarking Law requires the County to make reported benchmarking information readily available to the public. The first year's data of each reporting group will not be disclosed. Disclosure will begin the second year of each building group's reporting. For example: Disclosure will begin with calendar year 2016 data reported in 2017, the second year of reporting for Group 1. Data will eventually be available in the [CountyStat system](#).

Read more about [DEP Fact Sheet: Metrics Reported and Disclosed](#) (PDF, 26 KB).

Disclosed data and annual benchmarking reports are available on [DEP's Benchmarking website](#).

## Resources and Documents

All benchmarking resources and documents can be found on [DEP's Benchmarking website](#) under the Resources tab. Descriptions and direct links to the resources are available below:

### **Building Energy Benchmarking Introduction: Brochure and PowerPoint Slides**

Download the Montgomery County Benchmarking Brochure for an overview of what you need to know about the Law and how to get started. [Building Energy Benchmarking Law Brochure](#) (PDF, 1.1 MB).

To learn the basics of the Benchmarking Law, view the Montgomery County Benchmarking Introductory Forum presentations, held November 6, 2014, for an overview from DEP, Pepco, and ENERGY STAR. Watch the [recording](#) or view the [slides](#) (PDF, 2.3 MB).

### **Email Updates and Google Group**

Building owners should sign up for the [Commercial Energy News](#) email newsletter to stay up to date on compliance deadlines and other important Benchmarking Law information.

Join the [Montgomery County Energy Benchmarking Forum](#)! Use this Google Group community to ask questions about the Benchmarking Law, share lessons learned, and access resources. This forum is intended to be a useful tool for building owners, tenants, property management companies, and other stakeholders learn best practices and make complying with the Benchmarking Law. Simply request access to the group using your professional email address or Google account. You can opt to receive messages as they are posted, or in a daily or weekly digest format.

### **Benchmarking and Reporting Checklist**

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, and comply with the Benchmarking Law. [Energy Benchmarking and Reporting Checklist \(PDF, 523 KB\)](#).

### **Online GIS Map for Locating Tax Parcel Boundaries**

Use the [online GIS map created from current Maryland tax assessment records](#) to locate the parcel that your building sits on, and see what other buildings share your parcel.

*Reminder:* if your building shares a parcel with other buildings and collectively add up to 50,000 square feet and greater, you'll need to report benchmarking data to DEP.

### **How-to Guide for Data Verification**

This guide will help building owners and Recognized Data Verifiers complete verification required under the Benchmarking Law. Answers to general questions, separate step-by-step sections for both building owners and Recognized Data Verifiers, and additional resources to make verification a smooth and easy process. [How-to Guide for Data Verification \(PDF, 160KB\)](#).

### **Frequently Asked Questions**

DEP developed a FAQ document to answer questions, provide some clarity, and help organizations meet the Benchmarking Law. Questions cover the Law, how to organize your buildings, compliance, verification, and reporting. [Benchmarking Law FAQs \(PDF, 549 KB\)](#).

### **ENERGY STAR Portfolio Manager Assistance**

EPA offers a variety of resources to help users navigate the ENERGY STAR Portfolio Manager tool. The [ENERGY STAR Help Desk](#) offers an extensive list of searchable FAQs as well as different avenues to contact EPA staff with questions. EPA also offers [Portfolio Manager Trainings](#) that include full-length or short training videos, either in pre-recorded or live viewing formats.

### **Benchmarking Ambassadors**

The County's Benchmarking Ambassadors attended special 3-hour "train-the-trainer" Ambassadors Trainings at Montgomery College, taught by EPA ENERGY STAR Portfolio Manager Staff, got the details about complying with Montgomery County's Law, and information on accessing data from utilities. If you have a question about the Law or how to best proceed with your benchmarking, these individuals and organizations are a great place to start. [List of Benchmarking Ambassadors \(PDF, 311 KB\)](#).

*Disclaimer: Inclusion in this list does not confer certification, an official endorsement, or approval from the Montgomery County Government or any of its agencies.*

### **DEP's Building Inventory**

DEP developed a preliminary Covered Buildings Inventory to raise awareness about the Benchmarking Law. This list was created with current Maryland tax assessment records and the CoStar commercial building database.

Building owners can find [the most current version of the Private Covered Buildings Inventory on DEP's Benchmarking Website](#). When accessing the Covered Buildings Inventory, make sure to read the accompanying document, [Important Information about the Covered Buildings Inventory](#) (PDF, 108 KB).

Note: This inventory is an approximation, meant to raise awareness about the Law and help identify the buildings covered by the Law. Each building owner will need to confirm their own building square footage to determine coverage under the Law.

### **Building Definitions and Scenarios**

With the variety of building arrangements, parcels, and complexes in the County, how to benchmark your Covered buildings under the Benchmarking Law might have you scratching your head. DEP has put together a document that will walk you through the different scenarios building owners may find your Covered building in, whether the building needs to be benchmarked under the Law, and next steps for each scenario. [Building Definitions and Scenarios Guide](#) (PDF, 934 KB).

### **Tenant Information Request Letter Template**

Building owners may need to request operations information from their tenants to have a full and complete Portfolio Manager property entry. Building owners must request any space data needed in writing to the tenant no later than March 31 of each compliance year. Tenants must respond within 30 days of a request, per the Benchmarking Law. Using this template is not required and is only meant as a guide. [Tenant Information Request Letter Template](#) (MS Word, 99 KB).

### **Reported and Disclosed Metrics**

The Benchmarking Law requires the County to make reported benchmarking information readily available to the public. Not all collected metrics will be disclosed. The collected but undisclosed data will only be used to provide aggregate metrics and portfolio-wide benchmarks. [DEP Fact Sheet: Metrics Reported and Disclosed](#) (PDF, 26 KB).

### **Building Exemption and Waiver Application**

Per the Benchmarking Law, commercial buildings may request an exemption for certain use types or a waiver if the building meets certain requirements. Covered buildings seeking an exemption/waiver must submit this form to DEP no later than May 1 of the compliance year. [Building Exemption and Waiver Application](#) (PDF, 78 KB).

### **Benchmarking Case Studies**

DEP has put together a collection of case studies and profiles on the building owners in Montgomery County that have benchmarked their buildings. See all the BENCHMARKED profiles on [DEP's My Green Montgomery site](#).





### Montgomery County DEP Support

Montgomery County DEP offers support for building owners benchmarking in Portfolio Manager through the following resources:

- DEP Office Hours: Office hour sessions held at DEP’s office (255 Rockville Pike, Suite 120, Rockville, MD 20850) that features a brief overview presentation about the Benchmarking Law and an opportunity for one-on-one technical assistance. Subscribe to the [Commercial Energy News](#) for these event announcements.
- Benchmarking Law and Requirements Questions: If you have a question about compliance, details of the Law, or the processes and procedures to comply, email your question to DEP at [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).
- Portfolio Manager Support: In general, DEP uses the same Portfolio Manager resources as the public and can refer you to Portfolio Manager’s technical support. DEP may offer to try to help you with any straightforward questions in Portfolio Manager – in these cases, we may ask you to share your property (read-only) with us so we can look at it from our computers to try to solve the problem. You can revoke this sharing at any time. To request/schedule a DEP session, email DEP at [energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov).