

Effective Building Energy Benchmarking and Performance Policy

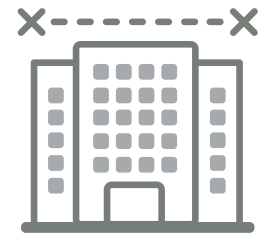
The Dos and Don'ts of Building Level Utility Data

To roll out effective whole building benchmarking and performance policies, it's important to position utilities (their data and systems) as active contributors – during policy conversations and implementation. The following “Dos” and “Don'ts” explore ways policymakers can do so while creating building level data regulations designed to ensure ongoing policy success, accurate, actionable data and a better building owner compliance experience.

Do

Define the role utilities should play in building data aggregation.

Utilities are in the best position to perform data aggregation. Although landlords know when leases start and end, utilities can define when services transfer between tenants and make sure all consumption is captured, including “revert to landlord” arrangements. Putting utilities (and their data set) in the driver's seat supports accuracy, creates a better experience for building owners and facilitates a successful policy rollout.



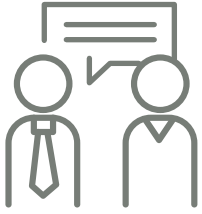
Require automatic, repeatable data transmission to ENERGY STAR Portfolio Manager®.

Easy data access and transmission make the process exponentially easier for those benchmarking, and when utilities create and maintain these connection points, there's a lower likelihood for error.

Encourage user-friendly data formats and regional standards.

In addition to pushing data to Portfolio Manager®, include recommendations around user-friendly data formats, such as Green Button Connect. Unlike PDFs and flat file extracts, machine-readable formats make data useful in multiple ways for customers and the energy services industry. Additionally, work with utilities in advance of new policy to explore and define regional standards.





Talk to utilities about the benefits of this data to their programs. In utility conversations, discuss the program benefits. For example, when utilities automate building data aggregation and submission (and bring back Portfolio Manager® metrics), they can better segment and target customers for relevant program marketing. They (utilities) can also target buildings for demand response and non-wires alternatives.

Establish tenant data privacy guidelines. Too often, there's little clear guidance for utilities regarding data anonymity standards, paving the way for overly restrictive practices that limit the usefulness of data. Explore use cases and best practices that make analysis possible while protecting customer data. Additionally, create meaningful tenant threshold recommendations for utilities to follow, so tenant privacy is maintained in the aggregation process (for example, a 4/40 rule). The Institute for Market Transformation provides helpful questions and considerations for regulators in their [Rethinking Energy Data Access white paper](#).



Don't

(Don't) put the onus on building owners and managers to lead the data capture process.

In policy language or conversation, communicate that the administrative burden shouldn't fall on building owners. For example, utilities can generate a list of meters for a building. And though building owners and managers know their buildings best, utilities should still provide mechanisms for aggregating usage data and ensuring accuracy. Data should also be pushed as needed for ongoing updates to Portfolio Manager®.

(Don't) only rely on billing data.

Bills don't always reflect the best possible data at any given time – billing cycles don't map to calendar months and billing dates vary widely. When shaping policy, regulators should encourage utilities to provide data based on consumption rather than bills whenever possible, giving building owners and managers an accurate, normalized understanding of their usage.

(Don't) miss the opportunity for this data to benefit a range of stakeholders.

The goal of building benchmarking is to make usage data useful. Benchmarking personas (building managers, operators, consultants) aren't always utility customers/account owners. Encourage utilities to not limit access based on accounts and talk to them about an approach that doesn't rely on existing technology (in which benchmarking functionality is a limited "add-on") geared for customers only. With appropriate building owner permission, utilities can and should provide access to an array of approved benchmarking stakeholders.

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