

# **P-12 Schools Initiative: Energy Benchmarking Guidelines**

## **Benchmarking Goals:**

NYSERDA's P-12 Schools Initiative encourages schools to lower energy use and utility bills while reducing greenhouse gas emissions. Cost-sharing is available through the P-12 Schools Initiative for Energy Benchmarking. Energy Benchmarking is a process of measuring and analyzing a building's utility costs, greenhouse gas emissions, and energy use over time, compared to an energy model, or relative to other buildings.

## **NYSERDA's P-12 Schools Programs Benchmarking Participation Process & Requirements:**

NYSERDA provides cost-sharing to eligible participants to utilize EPA's Energy Star Portfolio Manager (ESPM) benchmarking platform. Participants must agree to enter their building(s) utility consumption data into ESPM for a minimum of three annual periods:

- The first annual period shall consist of 12 months of recent historical utility consumption data to act as the baseline and comparison period.
- The second annual period shall consist of 12 months of consecutive annual utility consumption data, starting from the end of the baseline period, to track energy use over time.
- The third annual period shall consist of 12 months of consecutive annual utility consumption data, starting from the end of the first annual period, to continue tracking energy use over time.

Participants must also agree to share their building(s) data with NYSERDA's P-12 Schools ESPM account (NYSERDA\_P12\_Schools).

In return, NYSERDA will issue a minimum of three reports to the participant:

- Baseline benchmarking report (please see step 2)
- First annual benchmarking report (please see step 4)
- Second annual benchmarking report (please see step 6)

Upon NYSERDA's approval of the participant's application:

- 1) *The participant* shall:
  - a. Create an ESPM benchmarking account.
  - b. Add the relevant building(s) to be benchmarked.
    - i. Ensure the building name is data entered into the Name field under Address Information.
    - ii. Ensure buildings are named appropriately, ex. ABC Elementary School, rather than including physical address or nickname for the building.
    - iii. Consider entering the building name as "District Name "dash" School Name", ex. XYZ CSD-ABC Elementary School.
    - iv. Consider using common acronyms as to not run into any character limit issues (max. 80 characters), ex. central school district = CSD.
  - c. Input a minimum of 12 months of recent historical utility data for the building(s) into the ESPM benchmarking platform: [www.energystar.gov/buildings/benchmark](http://www.energystar.gov/buildings/benchmark).
  - d. Input building characteristic data required to benchmark the building(s) per ESPM guidance, currently available at: <https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>
  - e. Share the account's data with NYSERDA's P-12 Schools ESPM account, following steps outlined in the "How to Share Properties with Other Portfolio Manager® Users" guidance, currently available at [www.energystar.gov/sites/default/files/tools/Print\\_Resource\\_Sharing\\_Properties\\_080514\\_508.pdf](http://www.energystar.gov/sites/default/files/tools/Print_Resource_Sharing_Properties_080514_508.pdf). Data MUST be shared with NYSERDA\_P12\_Schools in order to participate in the benchmarking offering.
    - i. Establish connection in ESPM

1. Enter “NYSERDA\_P12\_Schools” in the username field in the Search box.
  2. Once NYSERDA accepts the connection request, you will be able to continue with sharing your property(ies). If your connection request is not accepted within 3 business days, email P-12Schools@nysesda.ny.gov.
- ii. Once the connection is established, proceed with sharing data:
1. When setting permissions under “Choose Permissions,” select “Personalized Sharing and Exchange Data”:

Choose **Permissions**

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select “Bulk Sharing.” If you need to assign different permissions, select the 2nd option.

- \*  **Bulk Sharing (“One-Size-Fits-All”)** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
- Personalized Sharing & Exchange Data (“Custom Orders”)** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

**Continue** [Cancel](#)

2. When editing individual permissions, select “Custom Access”
3. A new window will pop up to “Select Custom Access Permissions”.
  - a. Read Only access is acceptable for the permissions for “Property Information,” “All Meter Information,” and “Goals, Improvements & Checklists.”
  - b. You **MUST** select “Yes” under “Additional Options: Share Forward” for the connection to work correctly. See example below:

Select Custom Access Permissions to [Test School](#) for [NYSERDA P12 Schools](#)  
 Select the permission level below that you would like to grant [NYSERDA P12 Schools](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Recognition	<input type="radio"/>		<input type="radio"/>

Additional Options:

Item	Yes	No
* <b>Share Forward</b> Allow NYSERDA P12 Schools to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

**About Permissions**  
 Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property.

**Property Information**  
 Includes access to everything on Summary, Details, and Design tabs and all metrics for this property through the Reporting tab, even if you choose None for some of the other options.

- If you want someone to add & delete meters, you need to choose “Full Access” for Property Information

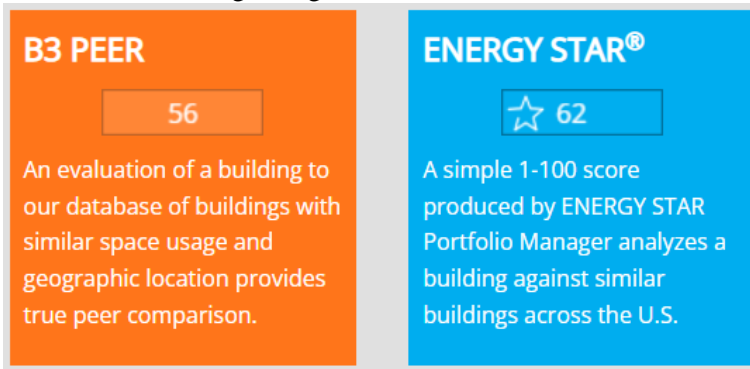
**All Meter Information**  
 Includes access to the Meters tab.

- None – suppresses access to the Meters tab, so the person can’t see your individual meters & bill entries. But annual metrics (based on the sum of these bills) are still accessible via Reporting.
- Read Only – provides access to view meter entries, but not make any edits.

**Apply Selection** [Cancel](#)

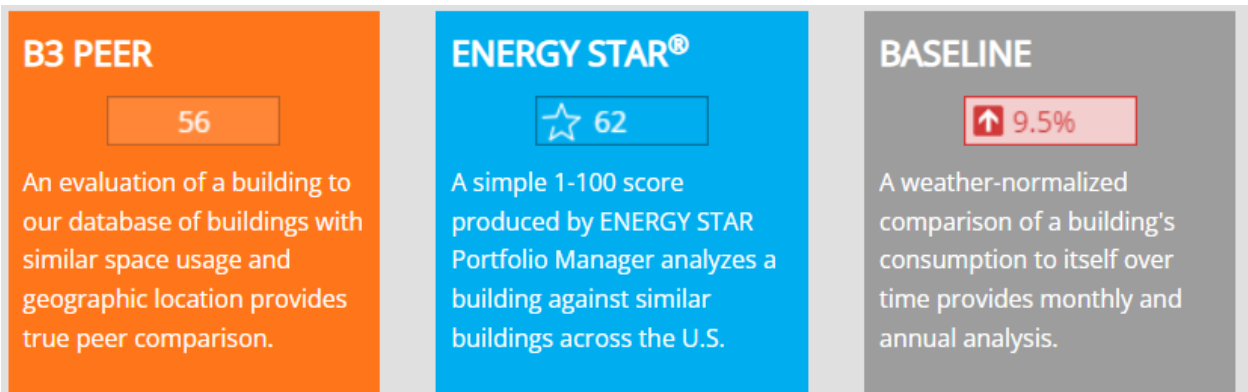
- 2) NYSERDA, through B3 Benchmarking, will issue a baseline benchmarking report for each school. Please expect an email from [noreply@b3benchmarking.com](mailto:noreply@b3benchmarking.com) with your report. This report will

provide visualizations of the electric and fuel use at the benchmarked school(s) as well as two initial benchmarking ratings:



Upon issuance of the baseline benchmarking report, *the participant* may invoice NYSERDA for the time spent gathering & data entering the necessary information in to ESPM, not to exceed \$100 per building.

- 3) At the frequency of *the participant's* choosing, however no longer than 14 months from the date of the initial benchmarked period, *the participant* shall enter the next 12 months of consecutive utility data from the baseline period into their ESPM benchmarking account: [www.energystar.gov/buildings/benchmark](http://www.energystar.gov/buildings/benchmark)
- 4) NYSERDA, through B3 Benchmarking, will issue the first annual benchmarking report for each school. Please expect an email from [noreply@b3benchmarking.com](mailto:noreply@b3benchmarking.com) with your report. This report will provide visualizations of the electric and fuel use at the benchmarked school(s) and provide three benchmark comparisons:



Upon issuance of the first annual benchmarking report, *the participant* may invoice NYSERDA for the time spent gathering & data entering the necessary information in to ESPM, not to exceed \$200 per building.

- 5) At the frequency of *the participant's* choosing, however no longer than 14 months from the date of the previous benchmarked period, *the participant* shall enter the next 12 months of consecutive utility data from the first annual report period into their ESPM benchmarking account: [www.energystar.gov/buildings/benchmark](http://www.energystar.gov/buildings/benchmark)
- 6) NYSERDA, through B3 Benchmarking, will issue the second annual benchmarking report for each school. Please expect an email from [noreply@b3benchmarking.com](mailto:noreply@b3benchmarking.com) with your report. This report

will provide visualizations of the electric and fuel use at the benchmarked school(s) and provide the benchmark comparisons shown under Step 4 above.

Upon issuance of the second annual benchmarking report, *the participant* may invoice NYSERDA for the time spent gathering & data entering the necessary information in to ESPM, not to exceed \$200.

The participant may continue to enter their utility data into their ESPM benchmarking account up until the point that either the \$500 per building incentive is exhausted or through the end of 2026, whichever comes first. NYSERDA will continue to issue annual reports, provided data continues to be entered into ESPM, through 2026.

Please note, participants that do not provide the required utility data to complete the baseline and/or annual benchmarking reports, or that fail to share their data with NYSERDA's P12 School's ESPM will either be ineligible for funding or may receive a reduced cost-share.

## **P-12 Schools Initiative: Energy Benchmarking Scope of Work**

Benchmarking may be completed as a standalone activity or as part of an energy study. Please see the [P-12 Schools Initiative](#) website for a sample scope of work template. Please insert the following content into your scope of work:

### **Benchmarking Report Recipient(s) Contact Information:**

- *[Include: Name, Title, Organization, Telephone, Email]*

### **Building(s) to be Benchmarked & Number of Students per Building:**

- *[List building(s) to be benchmarked and use case (ex. elementary, middle, or high school)]*
- *[List the number of students per building(s) to be benchmarked]*
- *[If multiple report recipient contacts are listed above, please identify if any particular contact should be associated with a particular building(s)]*

### **Benchmarking Tasks:**

*The tasks below represent the minimum required Benchmarking Scope of Work; add detail or additional tasks as desired.*

1. Create an EPA Energy Star Portfolio Manager (ESPM) benchmarking account.
2. Enter the building(s), building information, and utility consumption data into ESPM for the facility(ies) listed above.
3. Share the ESPM account's data with NYSERDA\_P12\_Schools.
4. [OPTIONAL]: Convene meeting(s) with facility management, engineering team, or other relevant party(ies) to discuss benchmarking reports and options for improving energy use & intensity.

### **Benchmarking Deliverables:**

1. Baseline data: Input a minimum of 12 months of recent historical utility data for each building.
  - a. *[Identify entity responsible for completion of this task (Name, Title, Organization)]*
  - b. *[Identify entity responsible for performing quality checks of the data entered into ESPM (Name, Title, Organization)]*
2. First annual benchmark: Within 14 months from the date of the initial benchmarked period, enter the next 12 months of consecutive utility data from the baseline period into ESPM for each building.
  - a. *[Identify entity responsible for completion of this task (Name, Title, Organization)]*
  - b. *[Identify entity responsible for performing quality checks of the data entered into ESPM (Name, Title, Organization)]*

3. Second annual benchmark: Within 14 months from the date of the previous benchmarked period, enter the next 12 months of consecutive utility data from the first annual report period into ESPM for each building.
  - a. *[Identify entity responsible for completion of this task (Name, Title, Organization)]*
  - b. *[Identify entity responsible for performing quality checks of the data entered into ESPM (Name, Title, Organization)]*

**Benchmarking Schedule:**

Deliverable 1 shall be completed within 3 months of application approval. Deliverables 2 and 3 shall be completed annually following the baseline report.

**Benchmarking Budget:**

The above tasks shall be completed on a time & material basis not to exceed the values below.

<b>Report Milestone</b>	<b>NYSERDA Not-to-Exceed Payment (per building)</b>
Baseline Report	\$100
First Annual Report	\$200
Second Annual Report	\$200
<b><i>Total Not-to-Exceed Budget</i></b>	<b>\$500</b>