City of San Diego Benchmarking Ordinance

City of San Diego Benchmarking Team

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NORESCO

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Agenda

- Overview of Benchmarking
- How to Benchmark your Building
- Q&A

Trainings and Resources Available

Visit the City's Benchmarking Website:

- Benchmarking Guide
- Training Modules
- Recorded Webinars
- Office Hours
- And more

URL:
https://www.sandiego.gov/sustainability-mobility/climate-action/bd/benchmarking

What is Benchmarking?

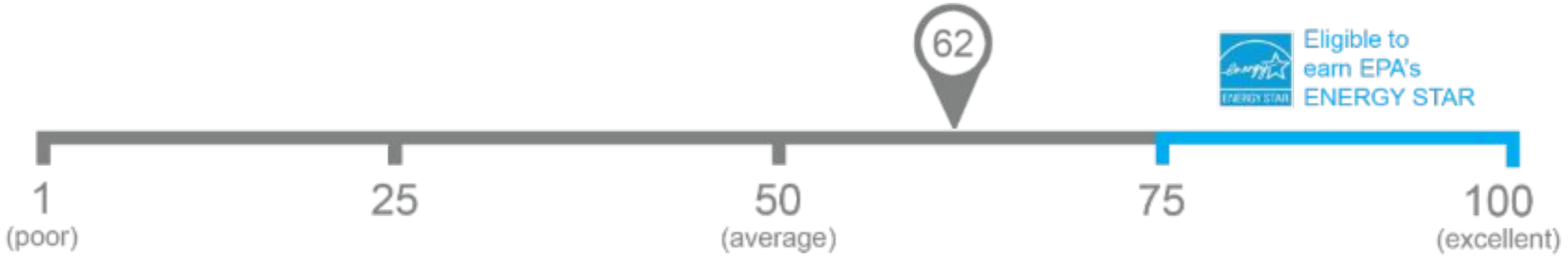
Benchmarking is the process of measuring a building's energy use to understand its performance and identify opportunities to reduce building owners' energy expenses.

Why Benchmark?

Building Owner Perspective

- Compare a building's energy consumption to peers or to itself at a past point
- **Receive ENERGY STAR Recognition**
- Understand a building’s operating costs when buying or leasing a property
- Use information to justify retrofit projects
- Opportunity for building owners to distinguish themselves in the marketplace as energy efficient

The 1-100 ENERGY STAR Score



One simple number
understood by ALL stakeholders.

ENERGY STAR® Portfolio Manager®

The Benefits of Benchmarking

By simply measuring your building's consumption, you could reduce energy use an average of

2.4% per year

An MIT Energy Initiative survey of hundreds of facility managers found:

70% used Portfolio Manager to inform energy efficiency upgrade plans

67% used Portfolio Manager to help justify the cost of an energy efficiency project

Examples of Energy Efficiency Projects

LED lighting and Controls retrofits

Electrification of HVAC and domestic hot water heating

Building envelope improvements and new glazing

Why Benchmark?

City Perspective

- Supports CAP Strategies to reduce residential, commercial, and municipal building energy use
- Aligns with California State Law AB 802 which requires benchmarking for commercial, mixed use and multifamily buildings 50,000 sq. ft. or greater
- **Provides the city with the ability to direct funds towards locally-based resources**
- Allows the City to build and foster relationships with its building owner and business community

San Diego's Benchmarking Ordinance

Requirements

Applies to buildings 50,000 sq. ft. or greater (with 17+ residential accounts) with some exemptions

Track and report energy use data to the City using ENERGY STAR® Portfolio Manager® annually by June 1.

Ordinance Goals

- Compliance with CAP/State Mandates
- Identify buildings with low energy performance
- Increase energy efficiency of SD building stock
- Identify buildings in Communities of Concern that could be eligible for supporting energy efficiency funding

Ordinance Exemptions

- Automatic
  - Buildings with more than half their gross floor area used as dedicated lab space or for industrial or manufacturing purposes.
  - Buildings owned by certain governmental agencies
  - Condominiums
- Must File an Exemption
  - Trade Secrets
  - Unable to access whole-building energy data
  - Building been unoccupied for more than half a year or is about to be demolished

Benchmarking Timeline

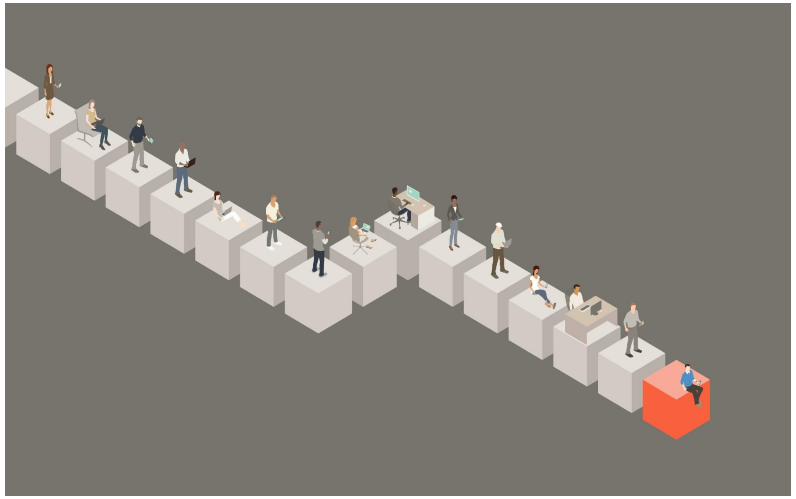
March 31, 2025: **Exemption Request Deadline**

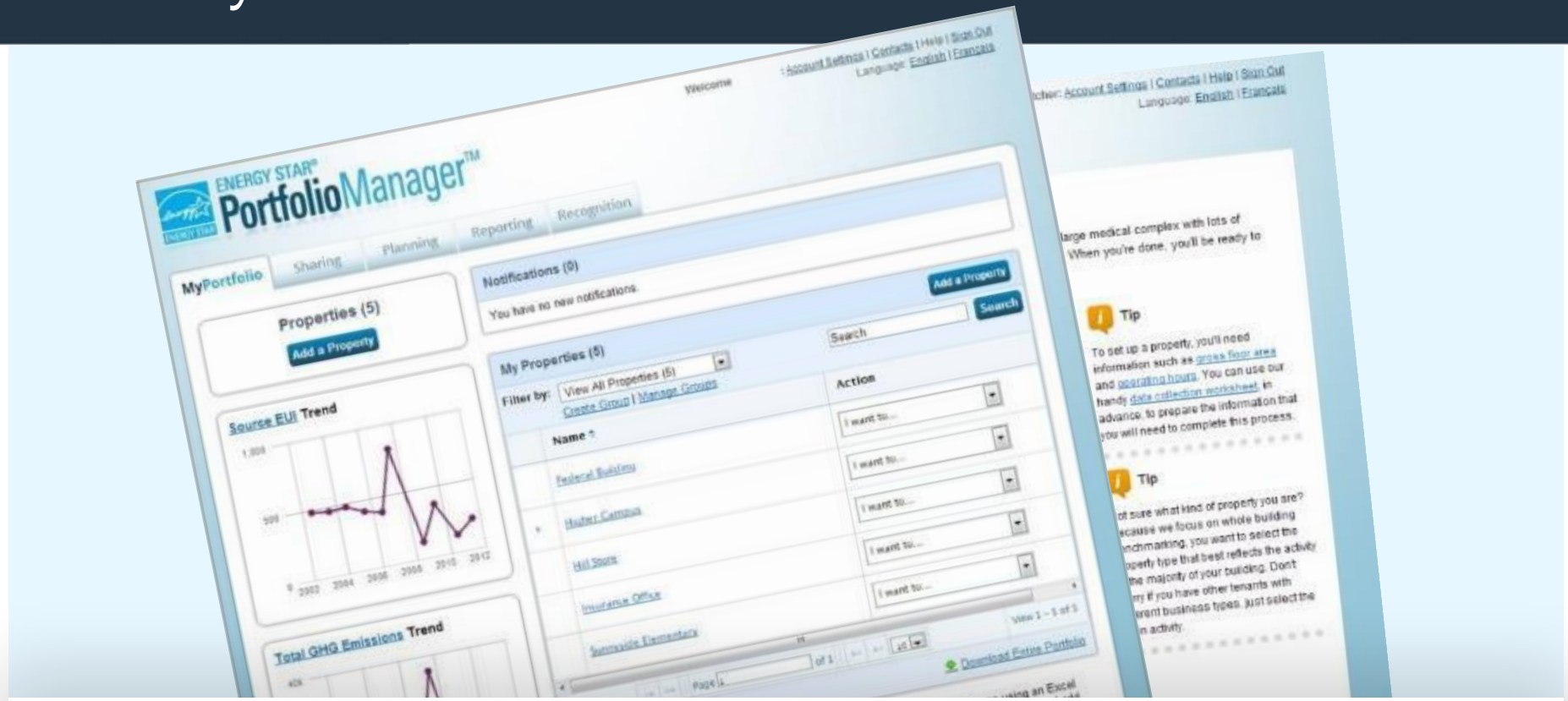
June 1, 2025: **Deadline for all reported data to the City**

September 1, 2025: **Building owners receive energy scorecards**

Compliance Process

- Setup ENERGY STAR Portfolio Manager Account
- Collect Data from SDG&E Portal
- Add City of SD as a Contact in Portfolio Manager
- Connect to BEAM
- Submit your Data





ENERGY STAR® PortfolioManager®

Data Input

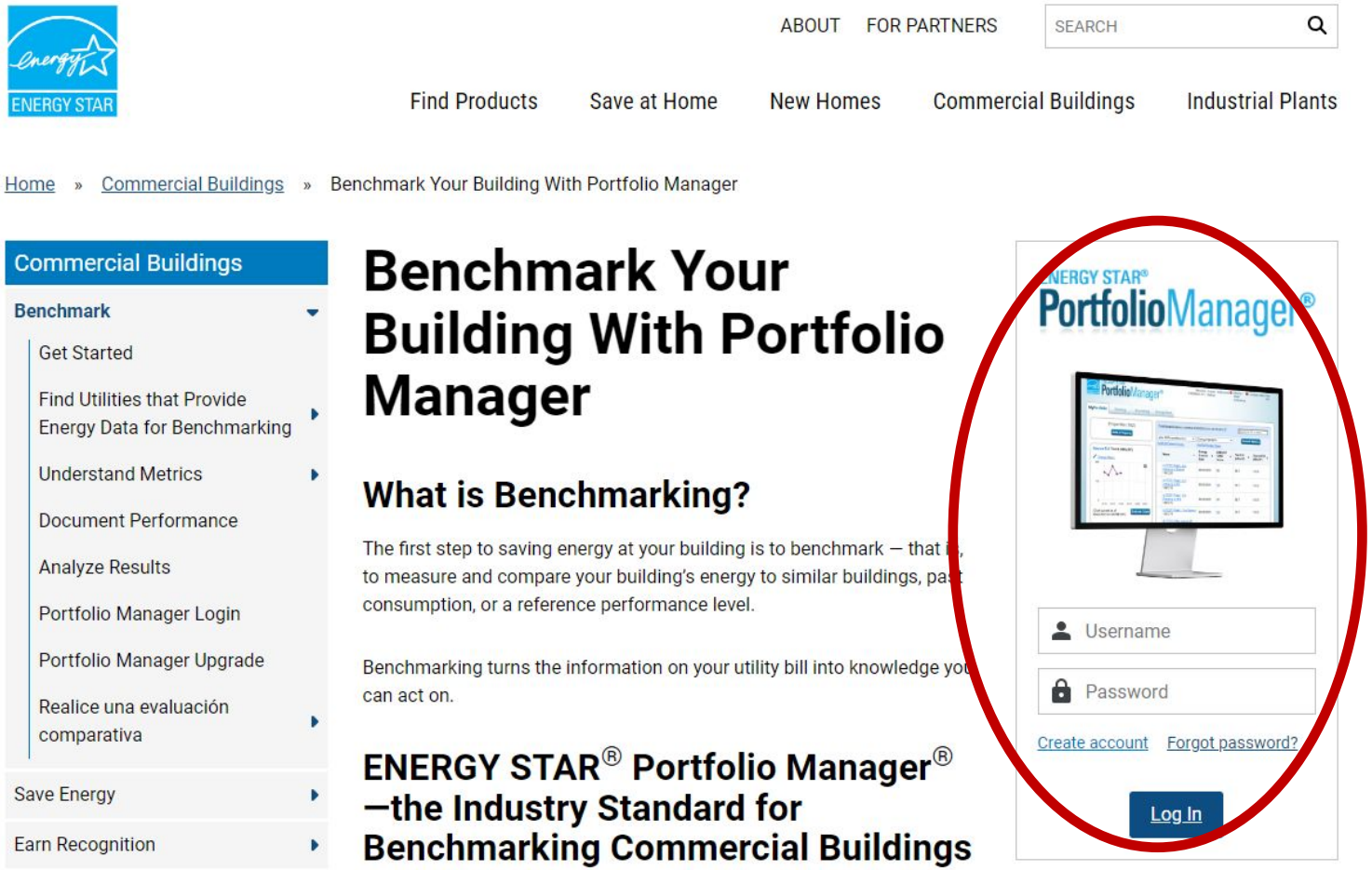
- Property address
- County
- Year built
- Primary use type
- Gross floor area
- Latitude and longitude
- Property or building name, if any
- Property floor area (building and parking)
- Open “comments” field for the building Owner or Owner’s Agent to provide additional information about the building
- ENERGY STAR Portfolio Manager Property ID
- Percentage of space occupied (Occupancy)
- Number of occupants
- Number of buildings (if served by one common Energy meter without submetering

Data Output

- *ENERGY STAR score*, for eligible buildings
- Monthly and/or annual site *Energy* use by *Energy* type
- **Monthly and/or annual weather-normalized site and/or source energy use intensity**
- Monthly and/or annual peak electricity demand
- Total annual greenhouse gas emissions
- Monthly and/or annual Site energy use intensity
- Compliance or noncompliance with this ordinance.

Four main steps to reporting your data

1. **Create Energy Start Portfolio Manager (ESPM) Account**
2. Add your buildings in ESPM
3. Request energy data from SDG&E
4. Connect your ESPM account/buildings with the City of San Diego



Create or Login to Portfolio Manager Account

https://www.energystar.gov/buildings/benchmark

Create a username and password, then log in

ENERGY STAR® PortfolioManager®

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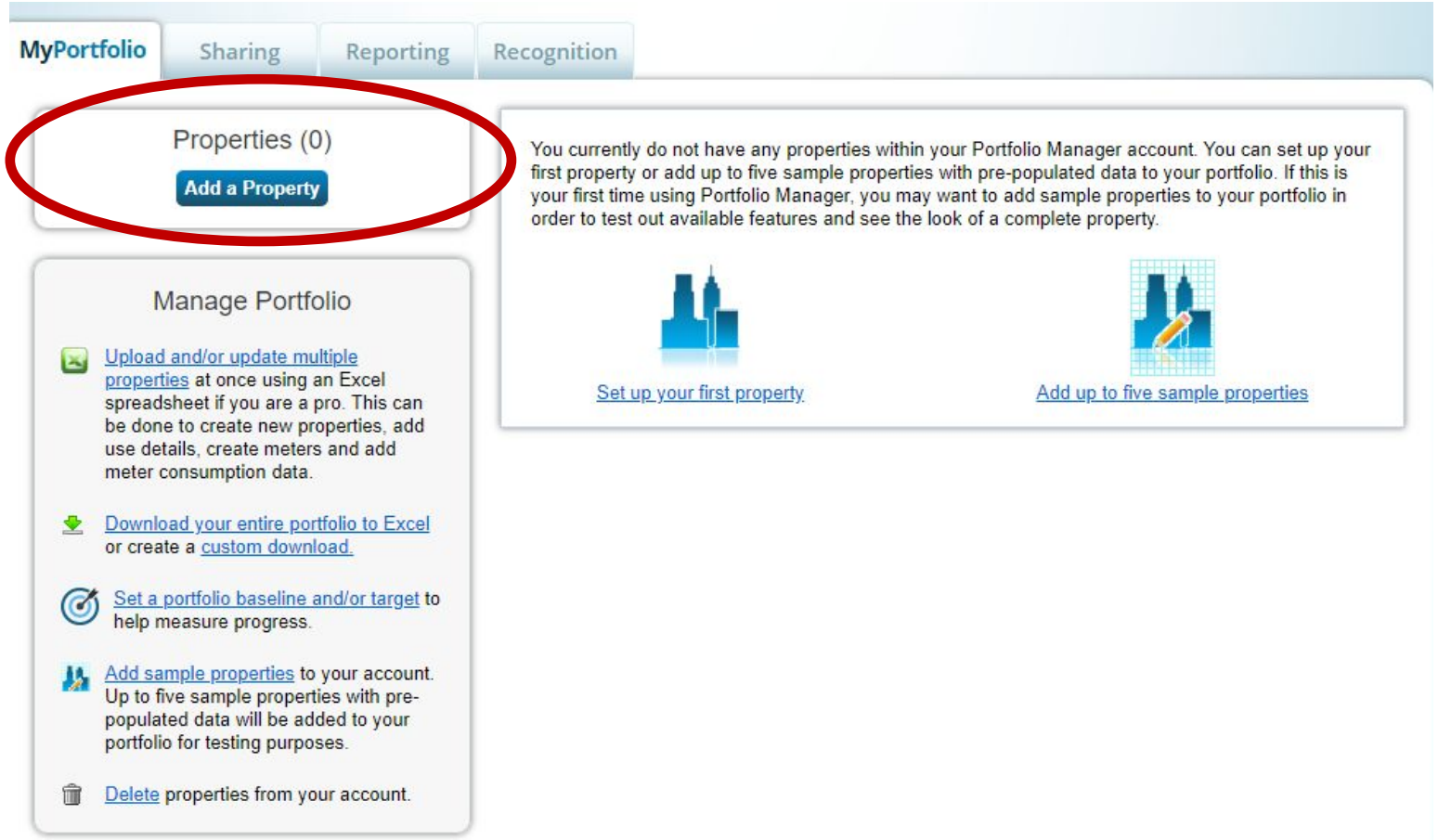
Add a Property

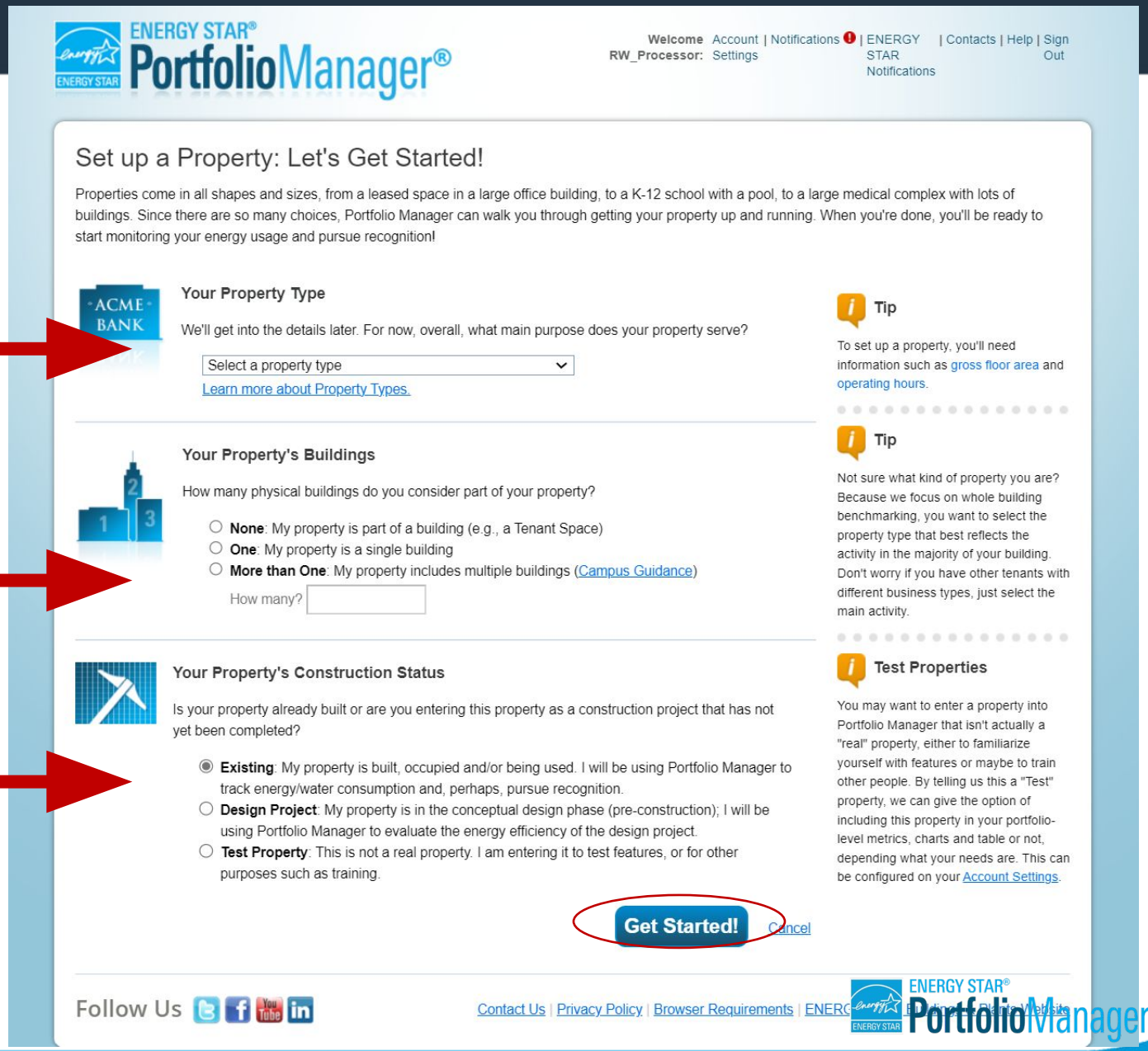


Add a Property: Existing Building

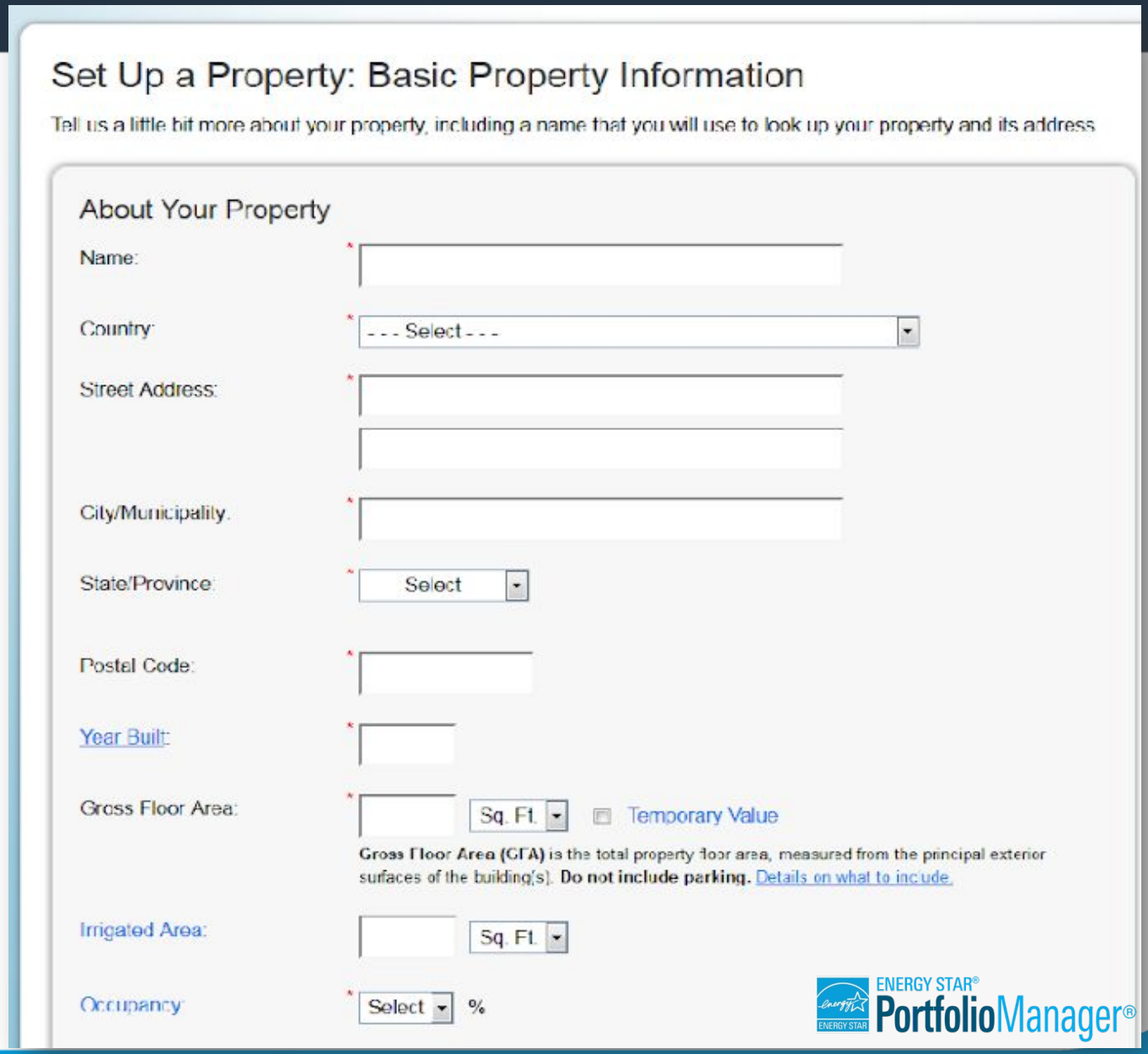
Select property type

Select number of buildings

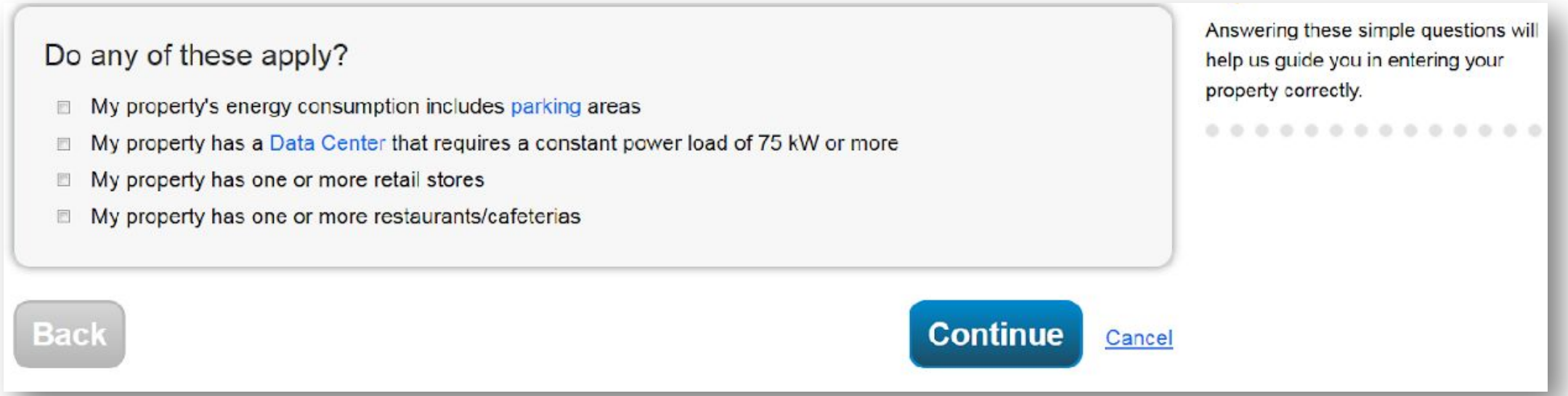
Select construction status



Enter Basic Property Information

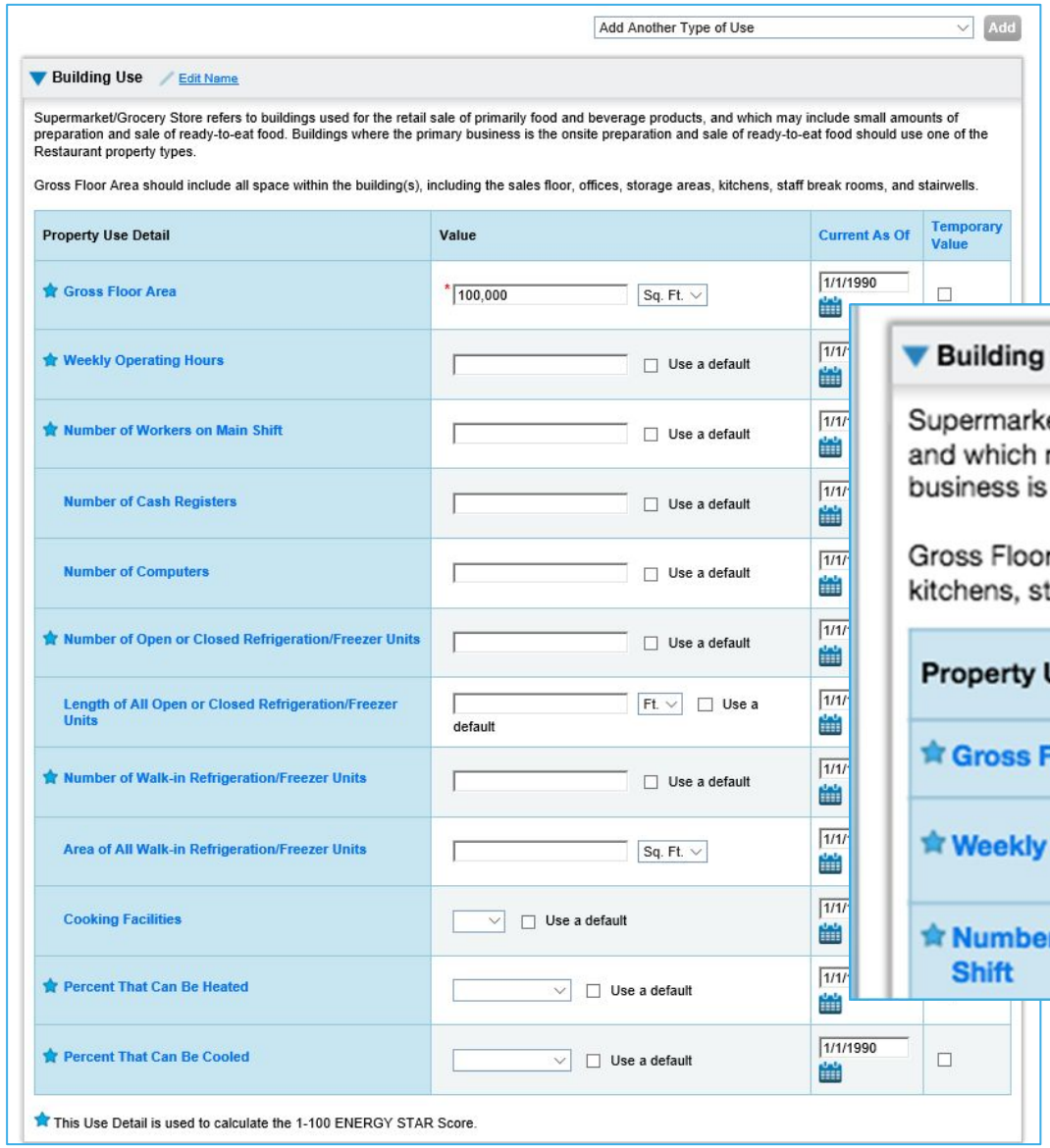


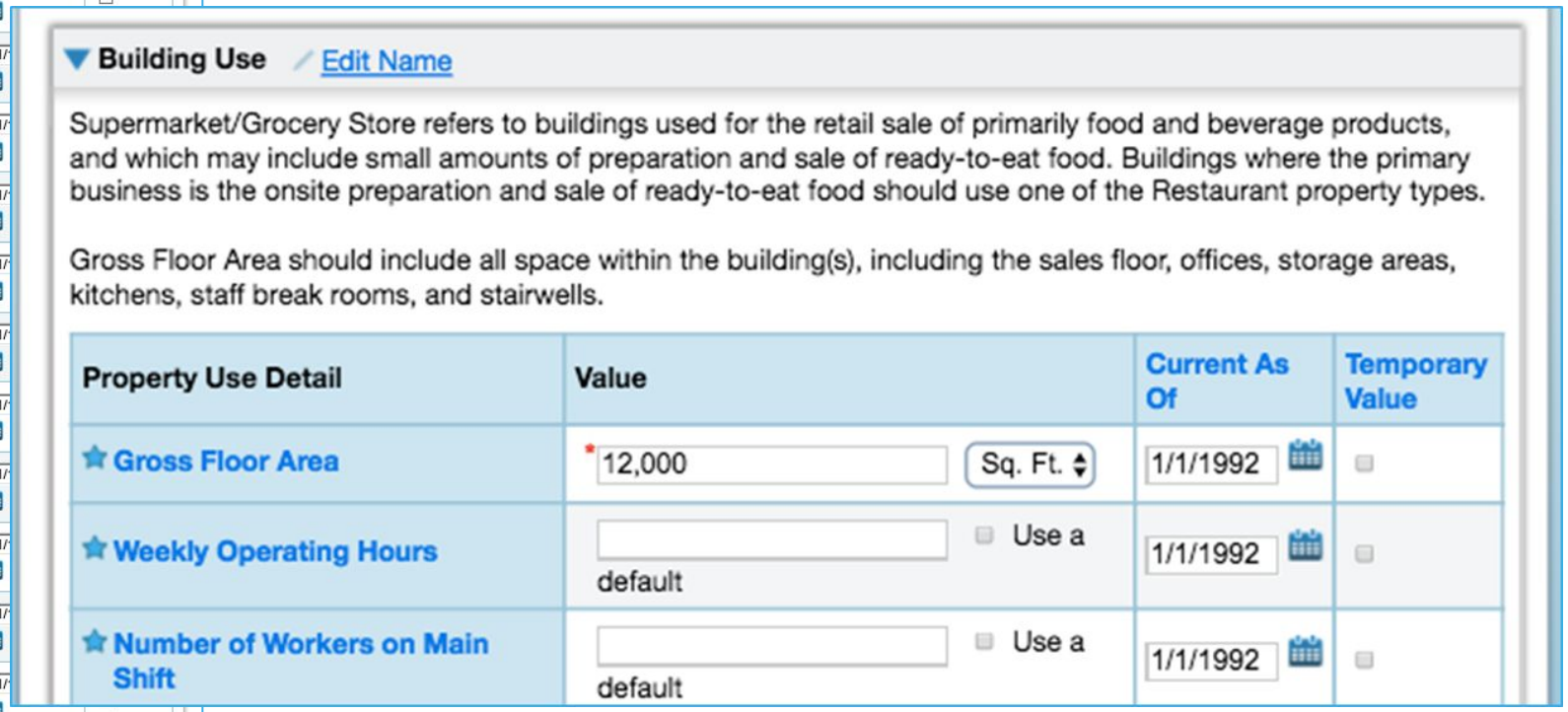
Check the statements that apply



These use details will change depending on the property type you specify.

Enter Required Building Characteristics

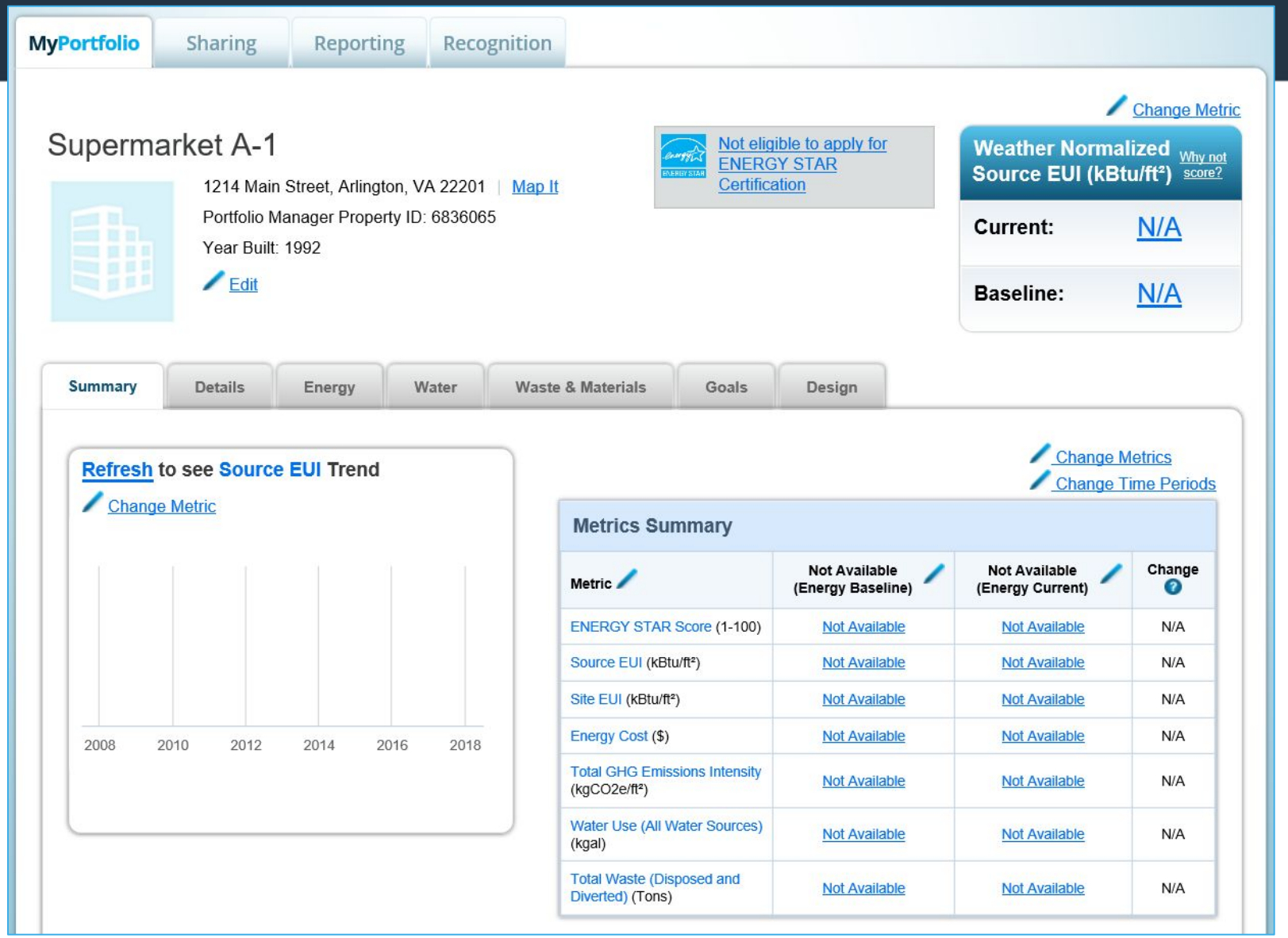




ENERGY STAR® Portfolio Manager®

Property Added Successfully!

View the Property Summary Tab



ENERGY STAR® Portfolio Manager®

Four main steps to reporting your data

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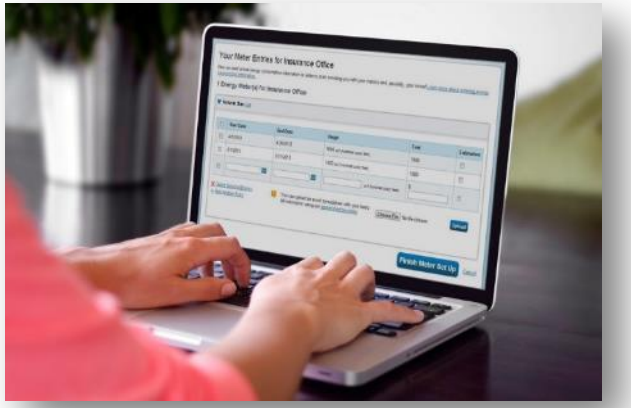
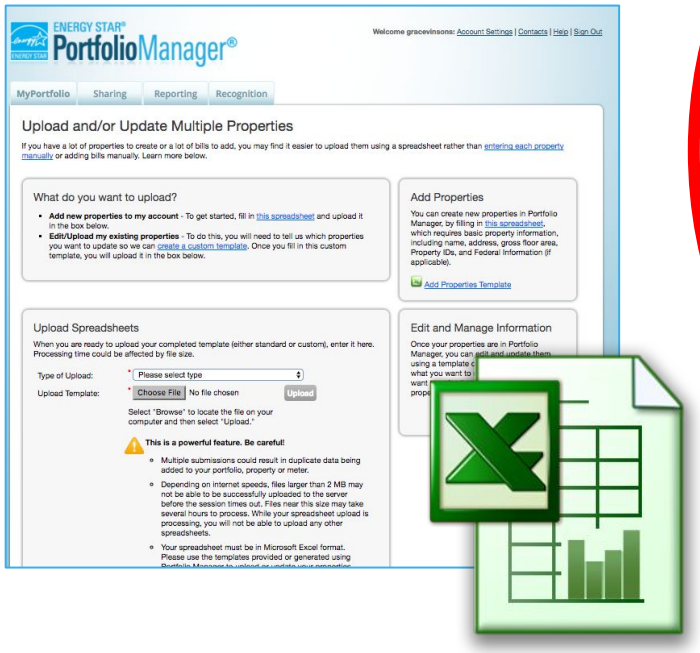
Enter Energy Data into Portfolio Manager

Manual entry



Spreadsheet upload



Web services

AB 802: Data Access

- Utilities must provide aggregated whole-building energy use data to building owners upon request starting Jan 1, 2017
- Building owner does NOT need permission from tenant when there are:
  - 3 or more accounts (all commercial)
  - 5 or more accounts (1+ residential accounts)
- For buildings with fewer tenants, utility may be asked to verify it has tenant permission to provide the building owner data

Aggregated Data

- For building owners with multiple tenants, you can request whole-building energy consumption data from utility for prior year
- Aggregated data can be obtained for:
  - Commercial buildings with 3+ utility accounts
  - Multifamily buildings with 5+ utility accounts
- If your building falls under these thresholds, you can still obtain aggregated data with letters of authorizations from tenants.

Requesting Data from SDG&E

Non-aggregated Data Request

Aggregated Data Request

Requesting Data from SDG&E

- In 2018, SDG&E launched an integrated benchmarking data request portal
- Streamlines the process for data requests and obtaining authorizations
- Learn more at SDGE.com/benchmarking

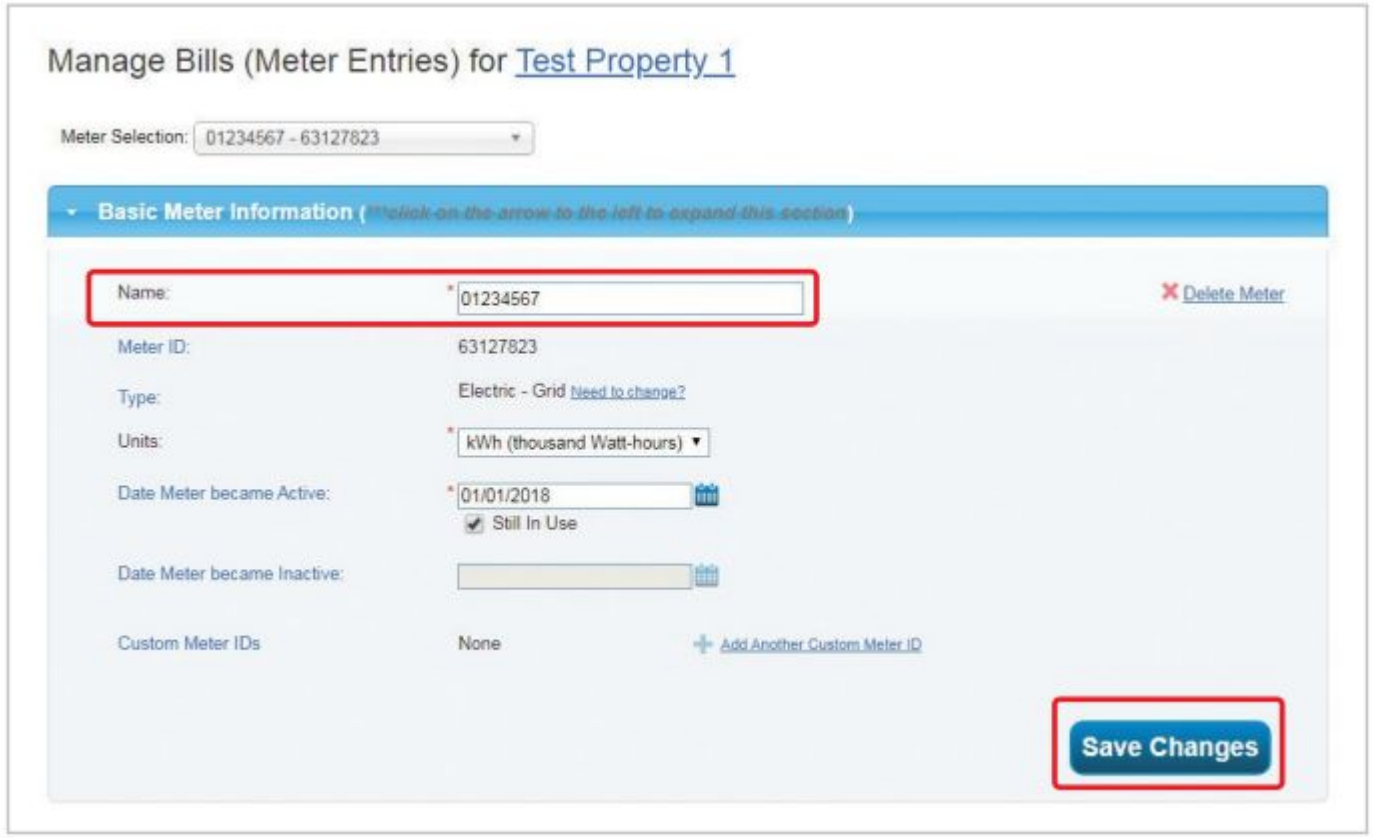
Connect with SDG&E in Portfolio Manager

Step #1:

Add SDG&E as a contact

- On the Contacts tab
- Select “Add New Contacts/Connections” Button
- Enter "SDGE BENCHMARKING“ into the Name Field
- Click Search and then Connect

Connect with SDG&E in Portfolio Manager

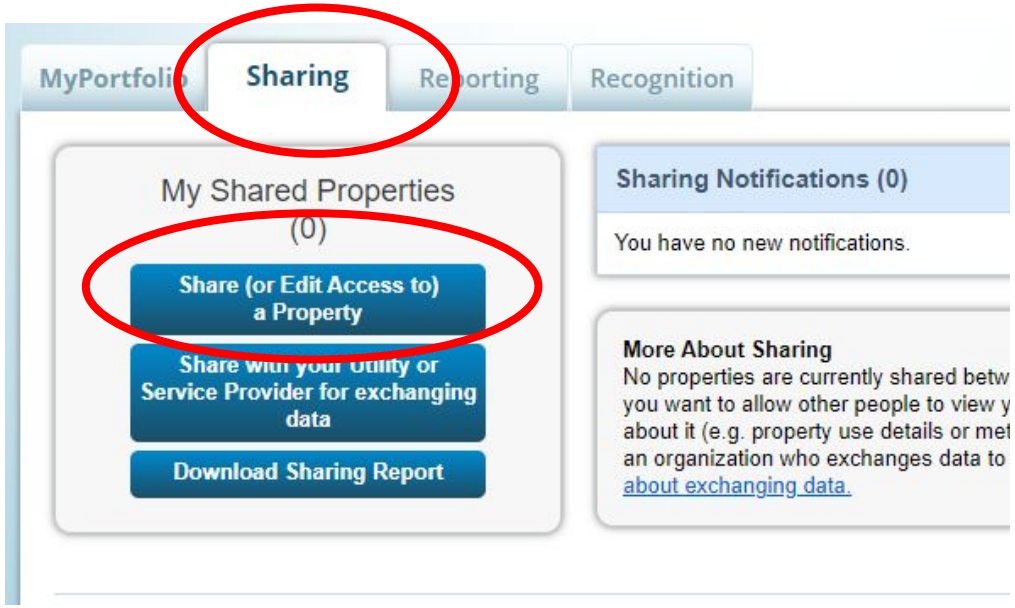


Step #2:

If you have existing meters, edit the account meter name to match the 8-digit SDG&E meter number

If you have not added meters, SDG&E will create them for you

Connect with SDG&E in Portfolio Manager

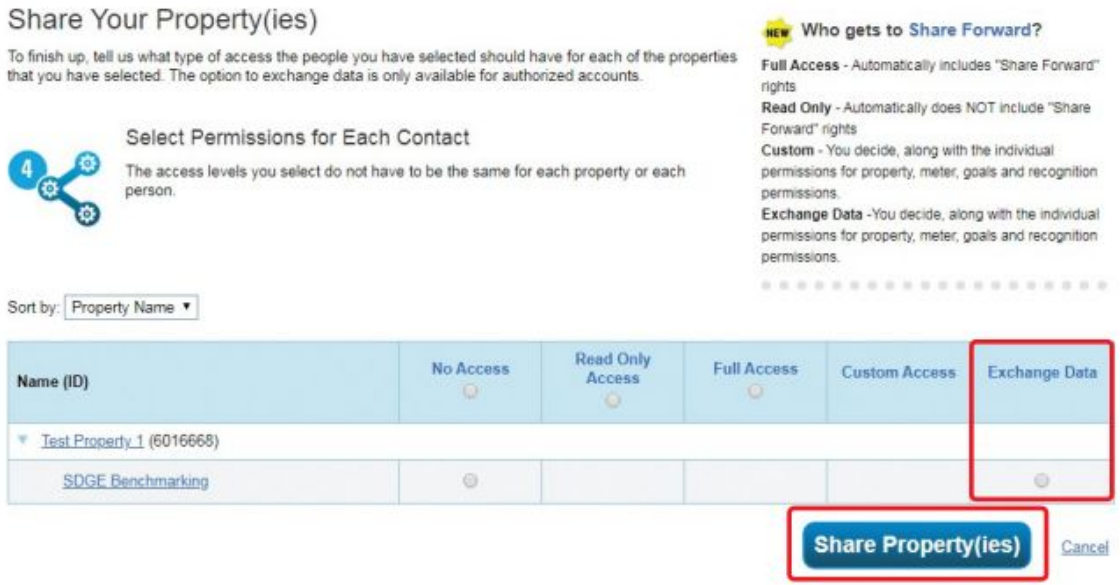


Step #3:

Submit share request

- Navigate to Sharing Tab
- Click **Share (or Edit Access to) a Property** Button
- Select your Property
- Choose **"SDGE Benchmarking (SDGE)"**
- Select PERSONALIZED SHARING & DATA EXCHANGE button; Continue

Connect with SDG&E in Portfolio Manager

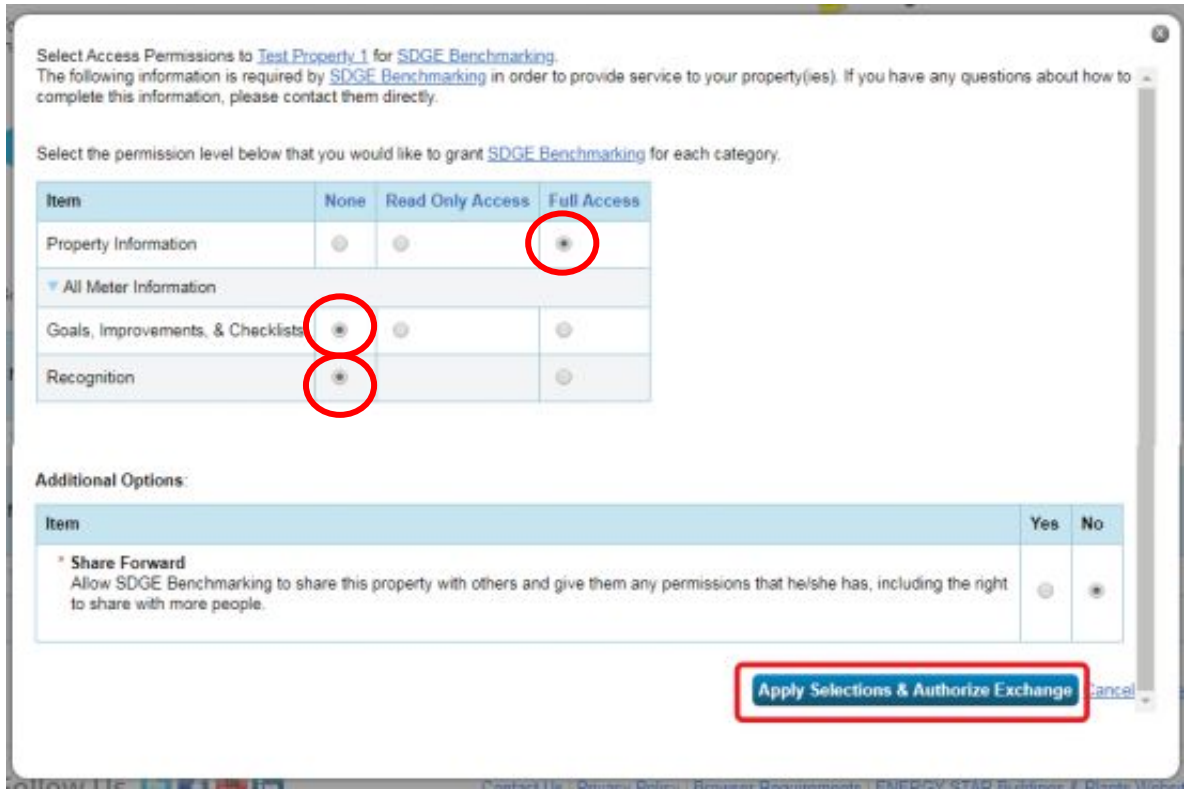


Step #3 (Cont.):

Submit share request

- Select Exchange Data radio button; then click Share Property
- A new pop-up window will appear

Connect with SDG&E in Portfolio Manager

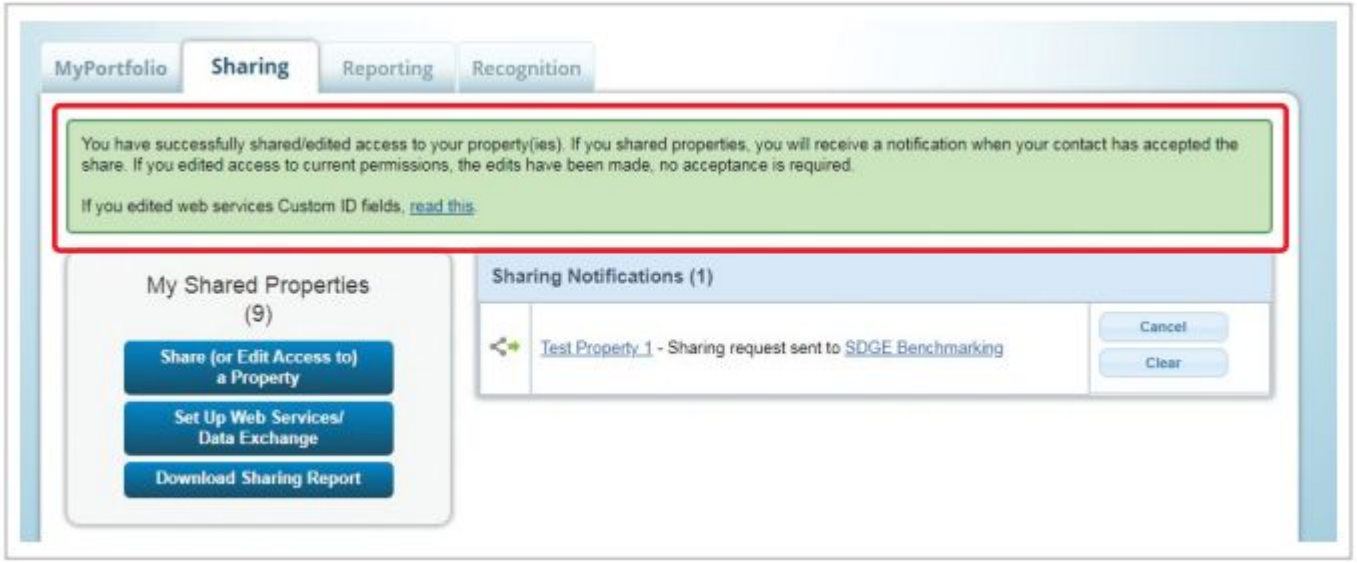


Step #3 (Cont.):

Submit share request

- Set access permissions as follows:
  - Property Information: FULL ACCESS
  - Goals, Improvements and Checklists: NONE
  - Recognition: NONE
- Click Apply Selections & Authorize Exchange
- Click Share Property

Connect with SDG&E in Portfolio Manager



A Message should appear indicating a successful share

SDG&E Request Portal

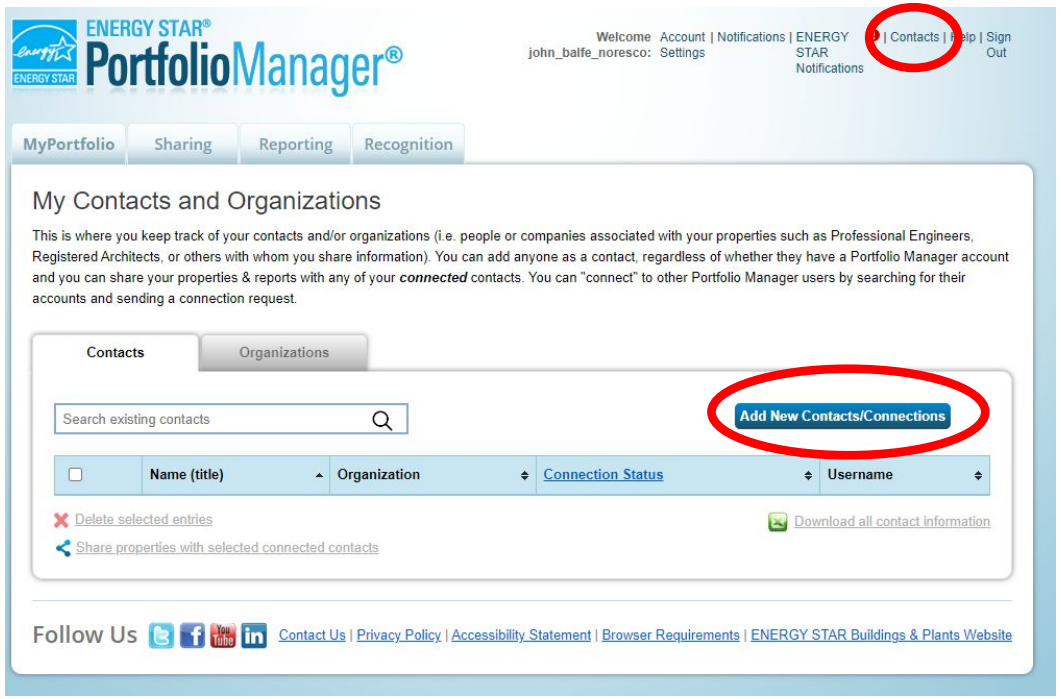
- Navigate back to the SDG&E Request Portal and select **Step 2: Start your Benchmarking Request**
- Follow the prompts and input all required information
- You will need your ENERGY STAR Portfolio Manager Username accessible
- You will receive a confirmation when your request is submitted successfully

Four main steps to reporting your data

1. Learning to Navigate Energy Start Portfolio Manager(ESPM)
2. Adding your buildings in ESPM
3. Requesting energy data from SDG&E
4. **Connecting your ESPM account/buildings with the City of San Diego Sustainability Department**

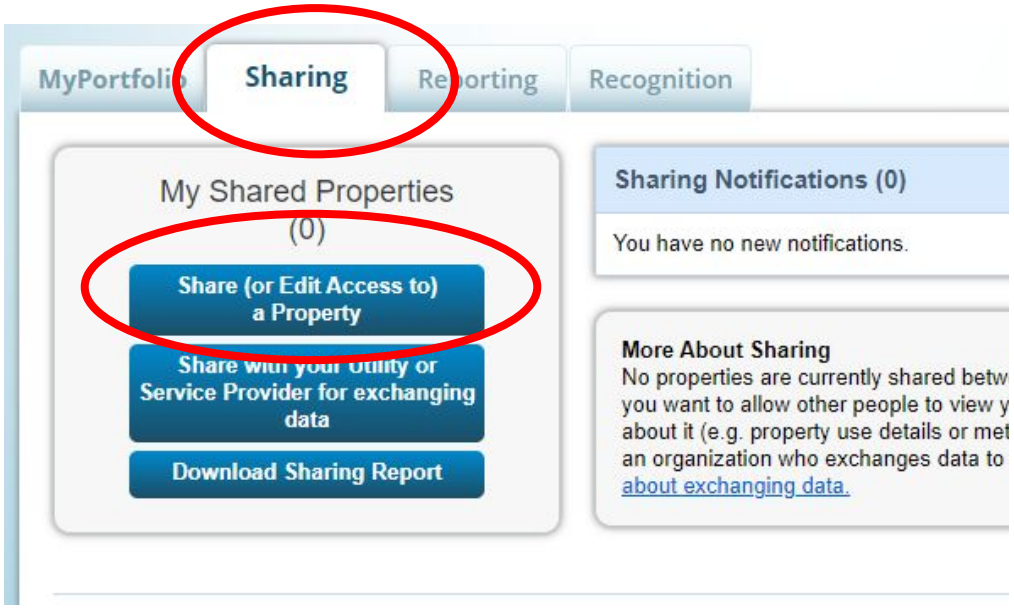
Connect with the City in ESPM

- Complete this step after your data has been shared by SDG&E to ESPM
- Login to your ESPM Account
- Select the Contacts tab
- Click Add New Contacts/Connections
- In the Username field, type: “CoSD_Sustainability” and select Connect, Send Connection Request
- CoSD_Sustainability will now appear in your list of connected contacts



Share Your Property's Data with the City

- Navigate to Sharing Tab
- Click **Share (or Edit Access to) a Property** Button
- Select your Property
- Choose **"CoSD_Sustainability"**
- Select PERSONALIZED SHARING & DATA EXCHANGE button; Continue
- Select Exchange Data radio button; then click Share Property
- In pop-up window, select Read Only Access for Property Information and All Meter Information; Select None for Goals, Improvements & Checklists, and Recognition; and Select No for Share Forward
- Select Apply Selections & Authorize Exchange
- Click Share Property and wait for confirmation email

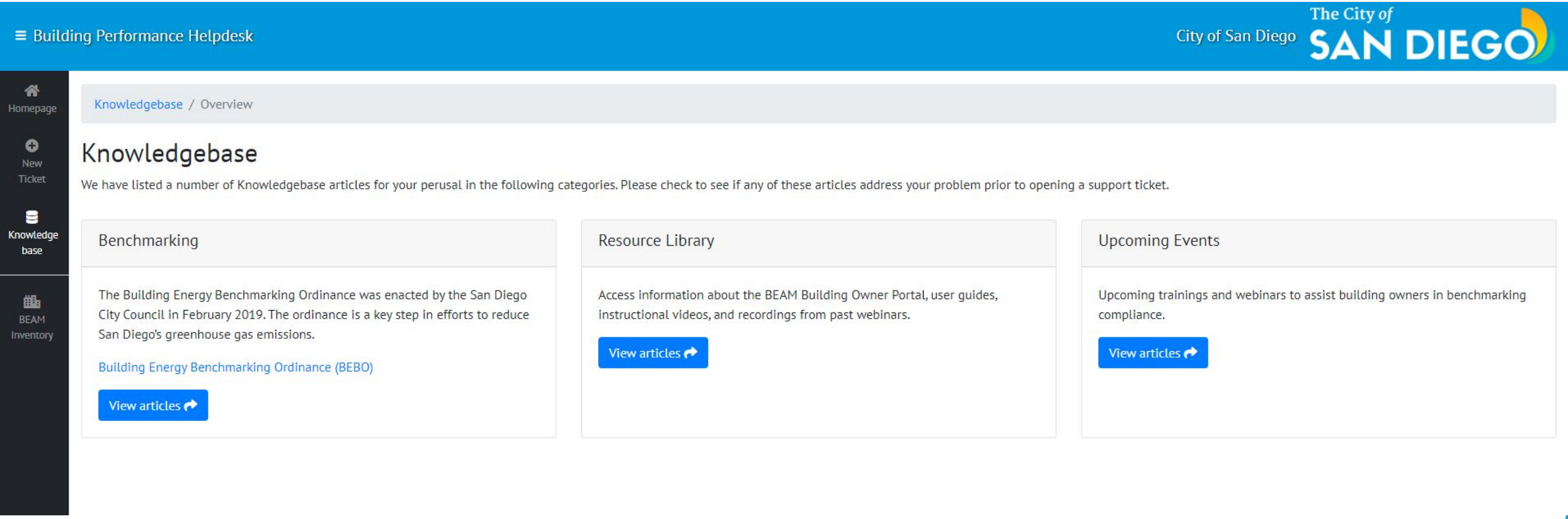


New Benchmarking Platform: BEAM

What is BEAM?

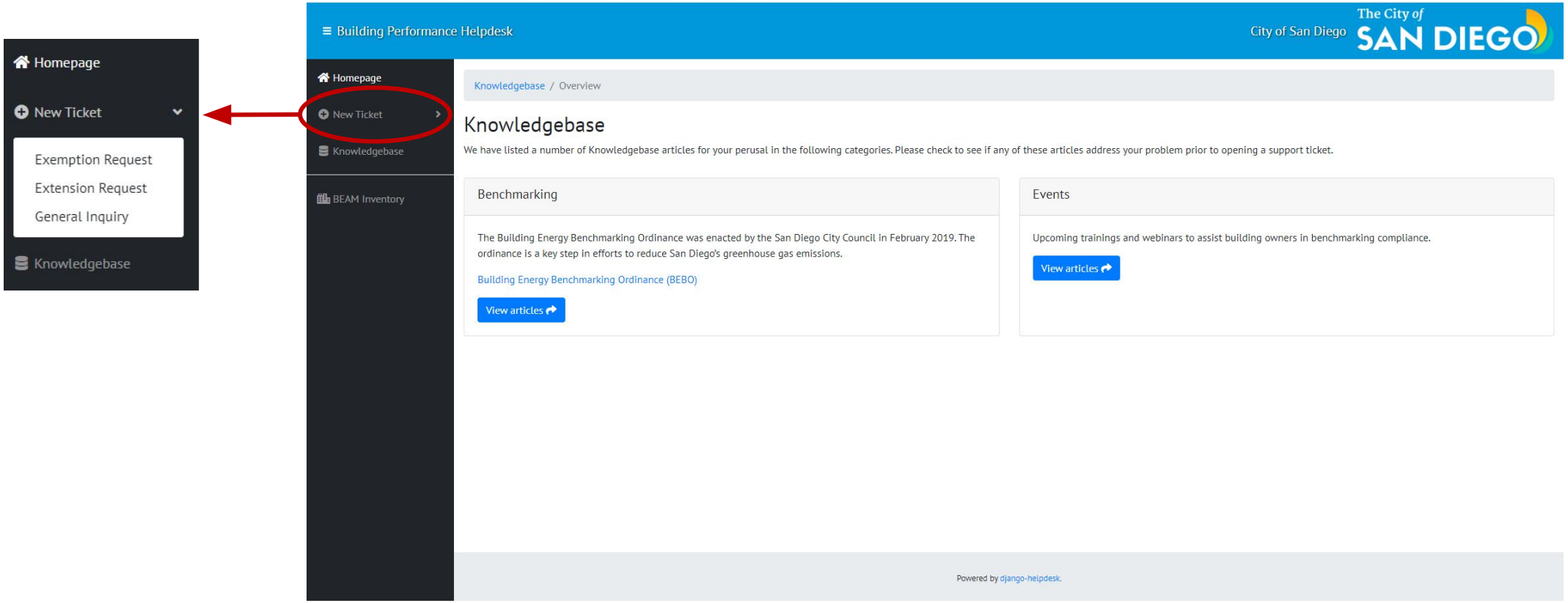
- A platform the City will use to manage/analyze the data from all benchmarked buildings
- Help Desk with knowledgebase of FAQs
- Ticket submittal system
    - Request Exemption or Extension
    - Ask a question

BEAM Knowledgebase

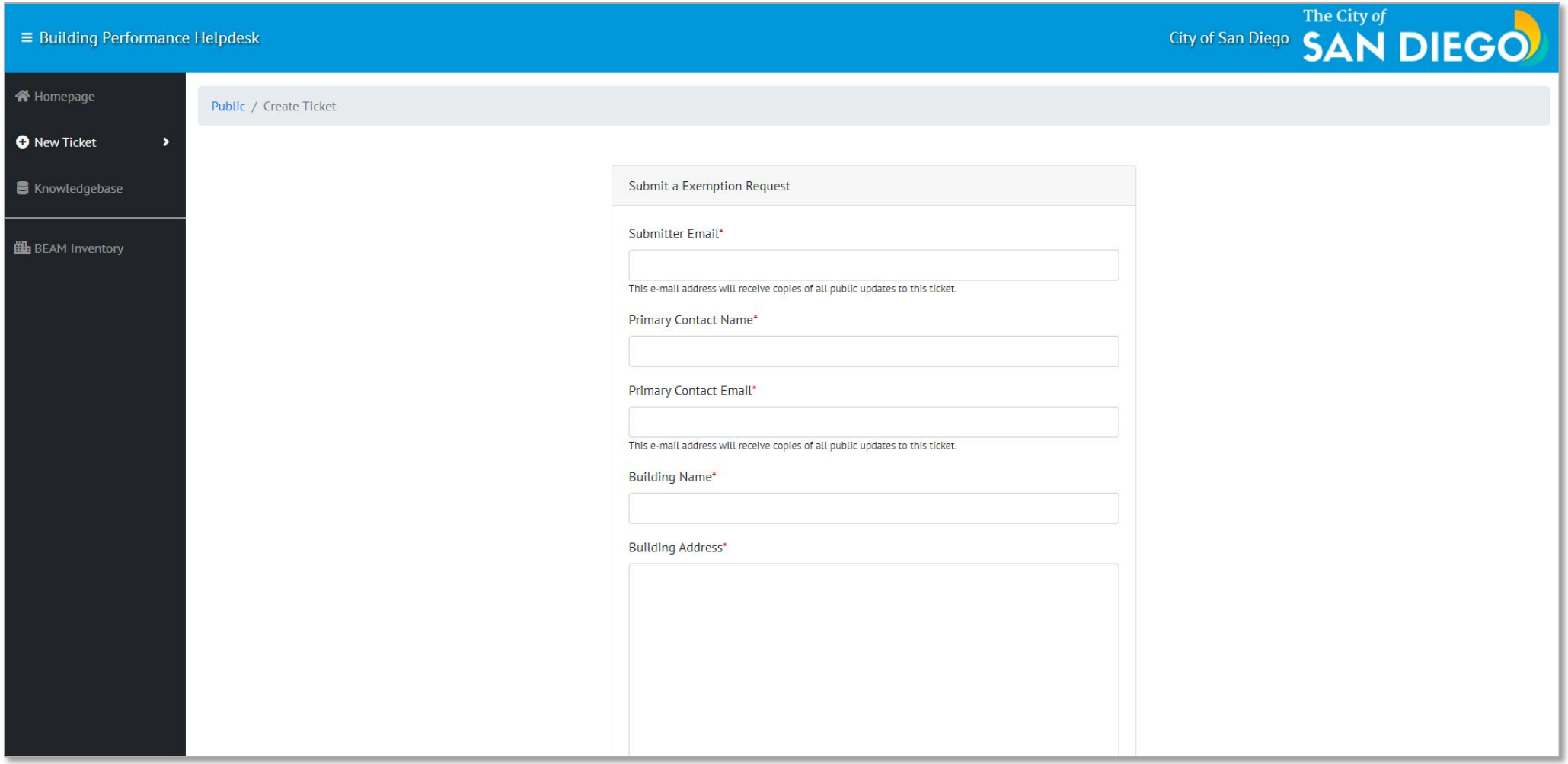


Link to BEAM Knowledgebase: https://sandiego.beam-portal.org/helpdesk/kb/

Submitting a Ticket



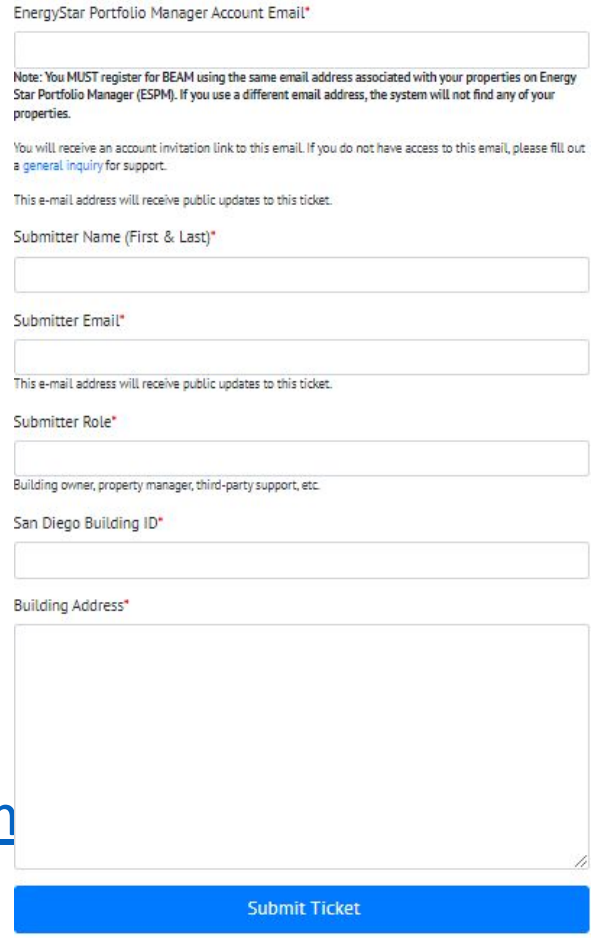
Complete Form and Submit



BEAM Building Owner Portal Registration

- Create an **optional** BEAM account to view:
  - Building energy performance
  - Info in the same way as the program administrators
  - Missing or inaccurate data flags
  - Past communications with the City
  - And more

Create an account here:
https://sandiego.beam-portal.org/helpdesk/tickets/subm


EnergyStar Portfolio Manager Account Email*

Note: You MUST register for BEAM using the same email address associated with your properties on Energy Star Portfolio Manager (ESPM). If you use a different email address, the system will not find any of your properties.

You will receive an account invitation link to this email. If you do not have access to this email, please fill out a general inquiry for support.

This e-mail address will receive public updates to this ticket.

Submitter Name (First & Last)*

Submitter Email*

This e-mail address will receive public updates to this ticket.

Submitter Role*

Building owner, property manager, third-party support, etc.

San Diego Building ID*

Building Address*

Submit Ticket

Next Steps

Access resources, sign-up for notifications, and report your data all at SanDiego.gov/Benchmark

Questions or Comments? Contact Benchmarkingsupport@sandiego.gov

Upcoming Events

- Training Webinar #2: May 13
- Office Hours at SD Central Library
  - March 12, 2025 at 9:30 a.m. – 11:30 a.m.PT
  - March 26, 2025 at 9:30 a.m. – 11:30 a.m.PT
  - April 9, 2025 at 9:30 a.m. – 11:30 a.m.PT
  - April 23, 2025 at 9:30 a.m. – 11:30 a.m.PT
  - Additional times in May are to be announced.

Additional Resources

- Assembly Bill 802 Benchmarking Program
- City of San Diego's Benchmarking Website
  - Instructional Videos on how to submit your data
- Portfolio Manager Help
  - Learn about Portfolio Manager
  - Take or view a training
  - Search FAQs
  - Ask a question
  - Check the glossary

Thank You!

Questions?

Email us at

Benchmarkingsupport@sandiego.gov