

City of San Diego Benchmarking Ordinance





City of San Diego Benchmarking Team



Jonathan Klopp

Building Decarbonization Program Coordinator



Shadi Mosavar

Senior Benchmarking Analyst



Today's Presenters

John Balfe, Senior Project Manager, NORESCO

Rachel Truttmann, Sustainability Consultant I NORESCO







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/cli mate-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.





The Benefits of Benchmarking

The average commercial building **wastes 30%** of its energy.



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







Portfolio Manager MyPortfolio Sharing Planning Reporting Recognitio large modical complex with lots of When you're done, you'll be ready to Notifications (0) Add a Proper You have no new notifications. Properties (5) Tip Search To set up a property, you'll need dd a Proper My Properties (5) information such as grows foor area Filter by: View All Properties (5) and <u>ocerating hours</u>. You can use our Grante Gircup | Manager Groups Action handy data collection worksheet, in advance, to prepare the information that Source EUI Trend I WATT TO you will need to complete this process. -Name 1 200 I mart to. Indecel Building • Tip of sure what kind of property you are? i mant to. Hater Campa • ecause we focus on whole building inchmarking, you want to select the I mant to... openly type that best reflects the activity -Hill Storm the majority of your building. Don't my if you have other tenants with 9 2002 2004 I mant tu. Intertence Office erent business types, just select the New 1-1st1 Total GHG Emissions Trend in activity. Supposed Connector *********** - [10]+ 2. Dominal Entre Patible 12 50 / Page 4 ing an Excel

Visionne

+ Hocaunt Betrata | Contexts | Help | Scan Cont Languager English (Franskis

scher: Account Settings | Contacts | Help | Sign Gut

Language English (Français



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









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 Sustainability Department





Add a Property







Enter Basic Property Information

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property		
Name:	*	
Country:	* Select	•
Street Address:	*	
City/Municipality.	*	
State/Province:	* Select •	
Postal Code:	*	
Year Built:	*	
Gross Floor Area:	Sq. Ft. 💌 🔳 Temporary Value	
	Gross Floor Area (GFA) is the total property floor area, measured surfaces of the building(s). Do not include parking. Details on w	from the principal exterior hal to include.
Irrigated Area:	Sq. Ft. 💌	
Occupancy	* Select v %	energy star® PortfolioManage



Check the statements that apply



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





Add Another Type of Use

✓ Add

Temporary

Value

V Building Use / Edit Name

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As O
🛊 Gross Floor Area	* 100,000 Sq. Ft. V	1/1/1990
🗙 Weekly Operating Hours	Use a default	1/1/
🗙 Number of Workers on Main Shift	Use a default	1/1/
Number of Cash Registers	Use a default	1/1/
Number of Computers	Use a default	1/1/ 1
Number of Open or Closed Refrigeration/Freezer Units	Use a default	[1/1/ ##
Length of All Open or Closed Refrigeration/Freezer Units	☐ Ft. ✓ ☐ Use a default	[1/1/ ::::::::::::::::::::::::::::::::::
🗙 Number of Walk-in Refrigeration/Freezer Units	Use a default	1/1/ 1
Area of All Walk-in Refrigeration/Freezer Units	Sq. Ft. V	1/1/ 1
Cooking Facilities	Use a default	[1/1/ ##
🛊 Percent That Can Be Heated	Use a default	1/1/
🕈 Percent That Can Be Cooled	Use a default	1/1/1990

Enter Required Building Characteristics

Building Use / Edit Name

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	*12,000 S	iq. Ft. 🗘 🛛 1/1/1992 🛍	
Weekly Operating Hours	default	Use a 1/1/1992	
Number of Workers on Main Shift	default	Use a 1/1/1992 🛍	



This Use Detail is used to calculate the 1-100 ENERGY STAR Score

Sustainability

Property Added Successfully!

View the Property Summary Tab

ortfolio	Sharing	Reporti	ing Recog								
										10	Change N
uperma	arket A-1 1214 Maii	n Street, Arling	ton, VA 22201	Map It		Not eligi ENERG Certifica	ible to apply for Y STAR ation	N S	Veather Nor ource EUI (I	maliz kBtu/	zed _{Why} /ft²) <u>sco</u>
	Portfolio N Year Built	Manager Prope :: 1992	erty ID: 6836065	5				с	urrent:	1	N/A
	/ Edit							в	aseline:	1	N/A
Summary	Dataila										
Pefrech t	Details	Energy	Water	Waste	& Materials	Goals	Design		Chan	ge Me	trics
Refresh t	to see Sourc	Energy e EUI Trend	Water	Waste	& Materials	Goals	Design		<u>Chan</u> <u>Chan</u>	<u>ge Me</u> g <u>e Tim</u>	trics ne Period
Refresh t	to see Sourc	Energy	Water	Waste	Metric Su	Goals	Design Not Available (Energy Baseline)	(E	Chan Chan Not Available Energy Current)	ge Me ge Tim	trics ne Period Change
Refresh t	to see Sourc	Energy	Water	Waste	Metrics Su Metric A ENERGY STAR	Goals mmary Score (1-100)	Design Not Available (Energy Baseline) Not Available	/ (E	Chan Chan Not Available Energy Current) Not Available	ge Me ge Tim	trics ne Period Change O N/A
Refresh t	to see Sourc	Energy	Water	Waste	Metrics Sur Metric Metric Sur ENERGY STAR Source EUI (kBt	Goals mmary Score (1-100) u/ft²)	Design Not Available (Energy Baseline) Not Available Not Available	/ (E	Chan Chan Not Available Energy Current) Not Available Not Available	ge Me ge Tim	trics ne Perioc Change O N/A N/A
Refresh t	to see Sourc	e EUI Trend	Water	Waste	Metrics Sur Metric ENERGY STAR Source EUI (kBtu/ft	Goals mmary Score (1-100) u/ft²)	Design Not Available (Energy Baseline) Not Available Not Available	(E	Chan Chan Chan Not Available Energy Current) Not Available Not Available	ge Me ge Tim	trics ne Period Change O N/A N/A N/A
Refresh t Change	Metric	e EUI Trend	Water	Waste	Materials Metrics Su Metric ENERGY STAR Source EUI (kBt Site EUI (kBtu/ft Energy Cost (\$)	Goals mmary Score (1-100) u/ft²) ²)	Design Not Available (Energy Baseline) Not Available Not Available Not Available	(E	Not Available Energy Current) Not Available Not Available Not Available Not Available	ge Me	trics ne Period Change N/A N/A N/A N/A
Refresh t Change	2010 2012	e EUI Trend	Water	Waste	Metrics Sur Metric Metric Metric Source EUI (kBtu/ft Site EUI (kBtu/ft Energy Cost (\$) Total GHG Emis (kgCO2e/ft ^a)	Goals mmary Score (1-100) u/ft ²) sions Intensity	Design Not Available (Energy Baseline) Not Available Not Available Not Available Not Available	/ (E	Chan Chan Chan Chan Chan Not Available Not Available	ge Me	trics ne Period Change O/A N/A N/A N/A N/A
Refresh t Change	2010 2012	e EUI Trend	Water	Waste	& Materials Metrics Sur Metric ENERGY STAR Source EUI (kBtu/ft Site EUI (kBtu/ft Energy Cost (\$) Total GHG Emis (kgCO2e/ft ^a) Vater Use (All V (kgal)	Goals mmary Score (1-100) u/ft²) 2) sions Intensity Vater Sources)	Design Not Available (Energy Baseline) Not Available Not Available Not Available Not Available		Chan Chan Chan Chan Not Available Not Available Not Available Not Available Not Available Not Available	ge Me	trics ne Period Change N/A N/A N/A N/A N/A





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 Sustainability Department





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:
 - \circ 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









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 <u>SDGE.com/benchmarking</u>





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



r Selection: 01234567 - 63127823	*		
Basic Meter Information (***	slick on the arrow to the lat	It to expand-this section	
Name:	* 01234567		X Delete Meter
Meter ID:	63127823		
Туре:	Electric - Grid Need to a	shane?	
Units:	* kWh (thousand Watt-	hours) •	
Date Meter became Active:	* 01/01/2018	m	
Date Meter became Inactive:			
Custom Meter IDs	None	- Add Another Custom Meter ID	

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





Submit share request

Step #3:

- 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



NEW Who gets to Share Forward?

rights

Forward' rights

permissions

permissions.

Full Access - Automatically includes "Share Forward"

Read Only - Automatically does NOT include "Share

permissions for property, meter, goals and recognition

Exchange Data -You decide, along with the individual

permissions for property, meter, goals and recognition

Custom - You decide, along with the individual

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.



Sort by: Property Name *

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchan	ge Data
* Test Property 1 (6016668)						
SDGE Benchmarking	0				0	
				Share Property	(ies)	Cance

Step #3 (Cont.):

Submit share request

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



	None	Read Only Access	Full Access		
Property Information	0	0			
All Meter Information	\frown				
Goals, Improvements, & Checklis	its 🔹	0	0		
Recognition	(*)		•		
dditional Options: Item * Share Forward				Yes	No

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



Very have successfully shared/ortified access to		(in) If you shared proposition you will parature a polification when your e	ontact has accorded the
share. If you edited access to current permissi	ions, the edits	have been made, no acceptance is required.	unary nas accepted the
f you edited web services Custom ID fields, r	ad this		
My Shared Properties	Sha	ring Notifications (1)	
(9)			Cancel
Share (or Edit Access to) a Property	5.	Test Property 1 - Sharing request sent to SDGE Benchmarking	Clear
Set Up Web Services/ Data Exchange			

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

Sustainability

- 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

Sustainability

- 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

■ Building Performance Helpdesk



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



Submitting a Ticket

	■ Building Performance	Helpdesk	City of San Diego SAN DIEGO
👚 Homepage	🕈 Homepage	Knowledgebase / Overview	
Sew Ticket	New Ticket	Knowledgebase	of there articles address your problem prior to expering a support tight
Exemption Request Extension Request		Benchmarking	Fvents
General Inquiry	BEAM Inventory	The Building Energy Benchmarking Ordinance was enacted by the San Diego City Council in February 2019. The	Upcoming trainings and webinars to assist building owners in benchmarking compliance.
E Knowledgebase		ordinance is a key step in efforts to reduce San Diego's greenhouse gas emissions. Building Energy Benchmarking Ordinance (BEBO)	View articles 🅐
		View articles 📌	
		Powered by dj	ango-helpdesk.



Complete Form and Submit

Building Performance	Helpdesk City of San Diego	SAN DIEGO
🖀 Homepage	Public / Create Ticket	
✤ New Ticket >		
Knowledgebase	Submit a Exemption Request	
BEAM Inventory	Submitter Email*	
	This e-mail address will receive copies of all public updates to this ticket.	
	Primary Contact Name*	
	Primary Contact Email*	
	This e-mail address will receive copies of all public updates to this ticket.	
	Building Name*	
	Building Address*	

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

Sustainability

Create an account here:

https://sandiego.beam-portal.org/helpdesk/tickets/subm

<u>m</u>
Building Address*
San Diego Building ID*
Building owner, property manager, third-party support, etc.
Submitter Role*
This e-mail address will receive public updates to this ticket.
Submitter Email*
Submitter Name (First & Last)"
This e-mail address will receive public updates to this ticket.
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.
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.



Next Steps

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

Questions or Comments? Contact <u>Benchmarkingsupport@sandiego.gov</u>





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

- <u>Assembly Bill 802 Benchmarking Program</u>
- <u>City of San Diego's Benchmarking Website</u>
 - Instructional Videos on how to submit your data
- <u>Portfolio Manager Help</u>
 - 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