



NEW YORK STATE
HOUSING & COMMUNITY
RENEWAL

HOUSING
TRUST FUND CORPORATION

STATE OF
NEW YORK MORTGAGE
AGENCY

NEW YORK STATE HOUSING
FINANCE AGENCY

NEW YORK STATE AFFORDABLE
HOUSING CORPORATION

STATE OF
NEW YORK MUNICIPAL
BOND BANK AGENCY

TOBACCO SETTLEMENT
FINANCING CORPORATION

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GOVERNOR

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COMMISSIONER/CEO

OFFICE OF HOUSING MANAGEMENT MEMORANDUM #2014-C-01

To: All Housing Authority Executive Directors/Managers*
All Housing Company Owners, Managing Agents and Managers

From: Robert Damico, Director
Office of Housing Management

Date: August 4, 2014

Subject: New Procedure for Utility Consumption Record – Form HM-3

Affordable housing in general and the Office of Housing Management Bureau’s (OHM) portfolio of supervised housing companies and authorities specifically are disproportionately affected by rising energy costs. New York State Homes & Community Renewal (HCR) is seeking to include energy efficiency measures in all its developments. The recording and analysis of energy usage, known as “Benchmarking”, is the essential first step in this process of reducing energy costs.

In the past you have been required to submit a hard copy of the Utility Consumption Record annually with supporting documentation (e.g., utility company statements, etc.). **OHM is implementing a plan to replace the HM-3 form with an on-line energy tracking system.** The new web-based technology will track energy usage as well as analyze efficiencies of properties in our portfolio, and will do so using far less housing authority, company and OHM staff time.

The basic information reported in HM-3 can now be reported to OHM using the highly recognized tool ENERGY STAR *Portfolio Manager* (see attached) The tool is a free on-line energy tracking system which is already required for New York City housing developments over 50,000 square feet (40% of our portfolio) under the city’s Local Law 84.

To expedite this change in method of reporting utility consumption, OHM will set up the transition of data from properties into the Portfolio Manager system using a consultant who specializes in energy efficiency measures. The consulting firm of Steven Winter Associates (SWA) will work with OHM to establish a *Portfolio Manager* account in coordination with your staff.

SWA will provide these services to OHM through support from the Natural Resource Defense Council (NRDC – see attached) as part of the “Energy Efficiency for All New York” which NRDC is coordinating to identify cost effective ways to make affordable housing more energy efficient. As part of this effort, NRDC is working with OHM and using SWA to analyze available data to better quantify the potential of a variety of energy efficiency upgrades in NYS multifamily buildings.

Partnering to improve and preserve our homes and communities.

We are very excited about this smarter, reduced paper approach and look forward to sharing the first year's data with the entire portfolio so each development can see how its energy usage compares to similar developments in the vicinity. In order for us all to take advantage of this project and its potential benefits to operations, **data must be received by September 20, 2014.**

There is no commitment to use *Portfolio Manager* per se, as there are several other benchmarking programs in the market place; some which even automatically transfer the data from your utility company. There is also the option of engaging another consulting firm to provide the data in an appropriate format and pay the corresponding fees directly from operations.

For properties that already comply with Local Law 84 follow the attached steps for your consultant or yourself to "share" the information with HCR. For those without a *Portfolio Manager* account please follow the guides and tutorials on the Energy Star Portfolio Manager website. In addition virtual trainings will be conducted in September. Should you have questions about this change and the transition process, please contact Heather Nolen at benchmarking@swinter.com or 212-564-5800, x107.

Your assigned Housing Management Representative will be contacting you to check on your progress, and impart any new information or training opportunities that become available during this initiative. Thank you for your cooperation.



Robert Damico

* **This memorandum, unless otherwise indicated, is advisory or informational in nature for Federally-subsidized public housing developments.**

RD:ms

Encls

cc: Housing Authority Chairperson without Enclosures
Housing Company Owner without Enclosures

Guidelines for Using the EPA’s Energy Star Portfolio Manager Tool – How to share existing accounts with HCR

Buildings over 50,000 SF which comply with LL84 (the City Benchmarking law) can share their data with HCR by following these steps:

Contact the firm that files the building’s benchmarking data with the City.

Request that the firm “share” the account with “HCRProperty”

They will either know how to do this or they can follow the steps for sharing below.

If you file for the building, “share” the account with HCRProperty

Sharing steps:

1. Log into Portfolio Manager
2. In the upper right hand corner select **Contacts**
3. Under My Contacts select **Add Contact**
4. Under Search Criteria enter the **organization name: New York State Homes and Community Renewal** and the **Username: HCRProperty** (the search is case sensitive)
5. Search, once the account is located select **Connect**

A connection must be made before the account can be shared. HCR will receive the connection request and accept, you will be notified of the connection once HCR has confirmed the connection. After the connection has been made the account can be shared.

6. Returning to Portfolio Manager
7. From the tabs on the top select **Sharing**
8. On the Sharing tab, click **Share a Property**
9. You will be directed to a new screen, follow the prompts to share the property
 - a. Under **select properties** to share, select the site, either one property or multiple and the specific properties name
 - b. Under **Select People (Accounts)** select **New York State Homes and Community Renewal**
10. Confirm the property being shared and that the correct contact was selected, select to share with **Full Access**
Complete

Below are sample screenshots for key steps

Figure 1: Step 2

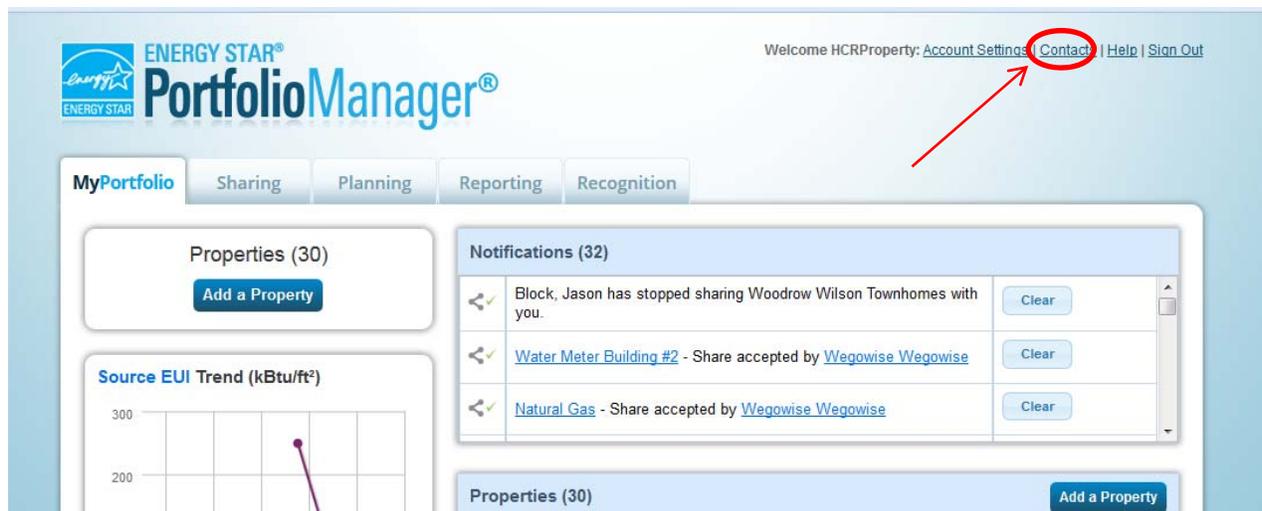


Figure 2: Step 3

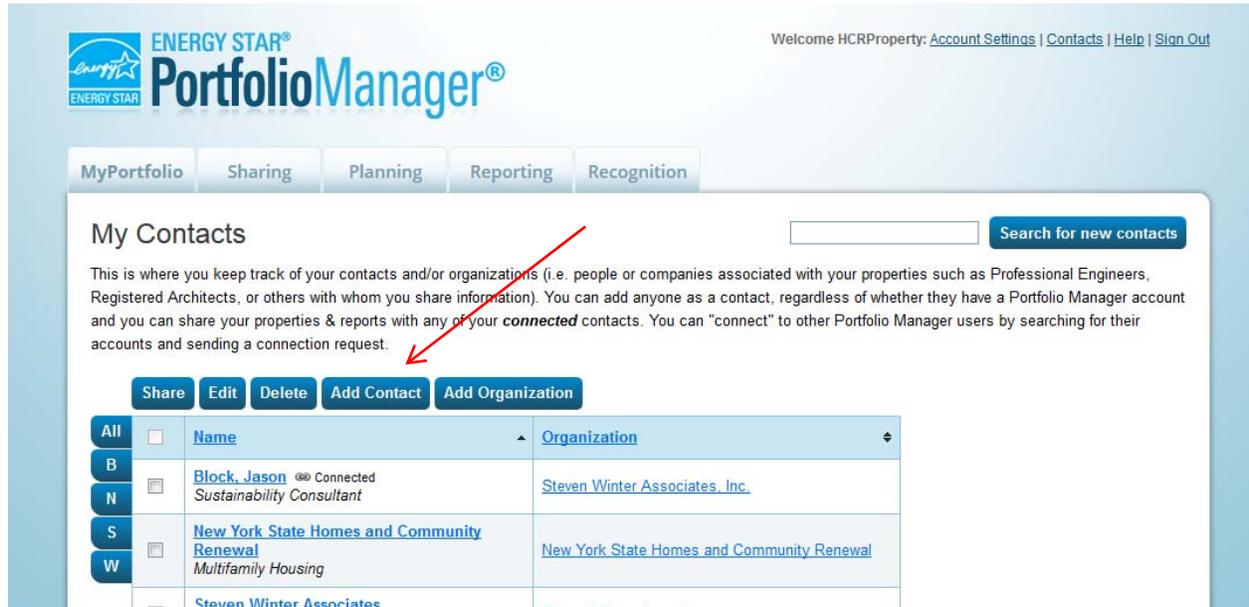


Figure 3: Steps 4 and 5

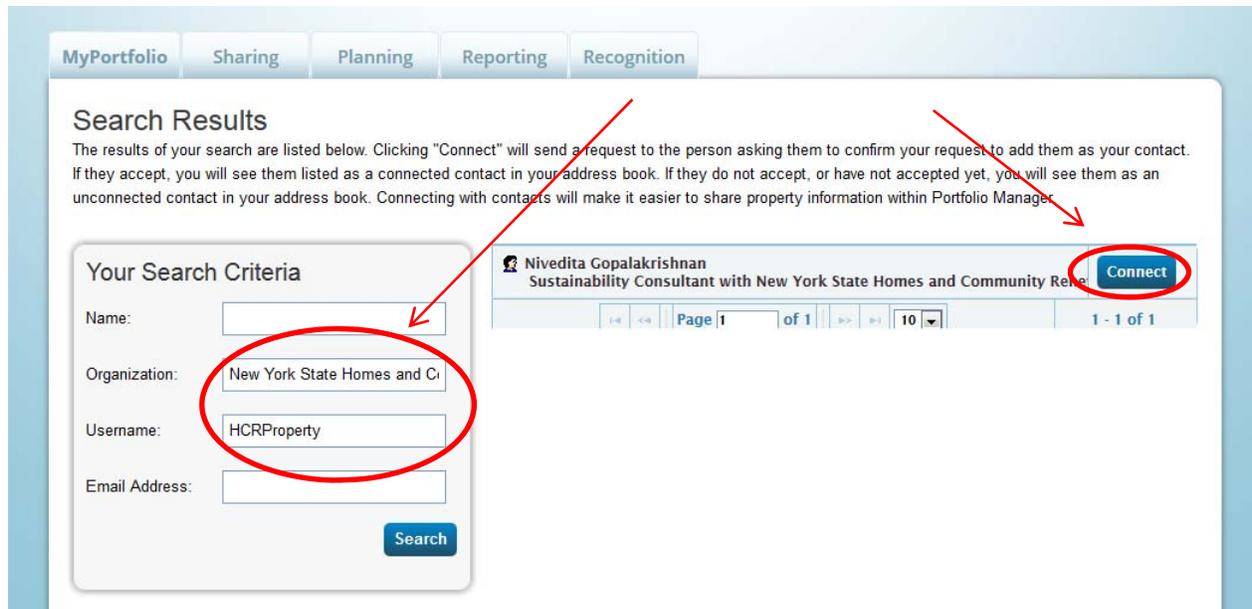
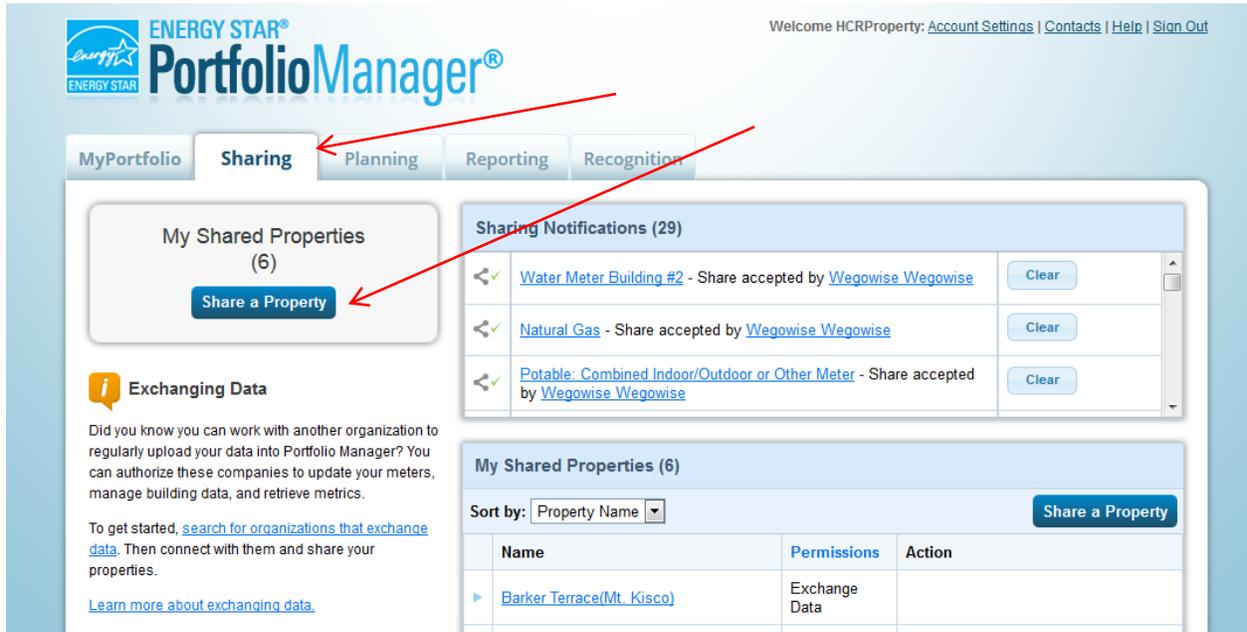


Figure 4: Steps 7 and 8



ENERGY STAR® PortfolioManager®

Welcome HCRProperty: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio **Sharing** Planning Reporting Recognition

My Shared Properties (6)
[Share a Property](#)

Sharing Notifications (29)

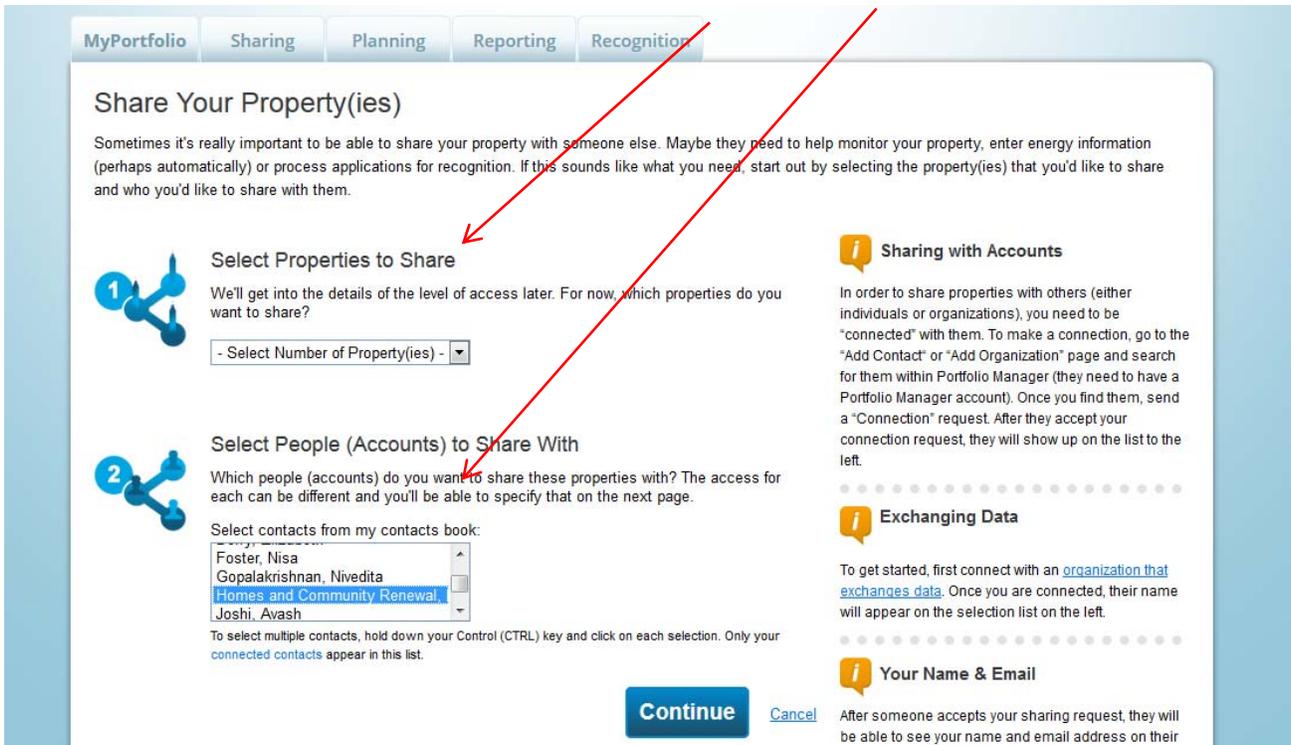
Water Meter Building #2 - Share accepted by Wegowise Wegowise	Clear
Natural Gas - Share accepted by Wegowise Wegowise	Clear
Potable: Combined Indoor/Outdoor or Other Meter - Share accepted by Wegowise Wegowise	Clear

My Shared Properties (6)
Sort by: [Property Name](#) [Share a Property](#)

Name	Permissions	Action
Barker Terrace(Mt. Kisco)	Exchange Data	

Exchanging Data
Did you know you can work with another organization to regularly upload your data into Portfolio Manager? You can authorize these companies to update your meters, manage building data, and retrieve metrics.
To get started, [search for organizations that exchange data](#). Then connect with them and share your properties.
[Learn more about exchanging data.](#)

Figure 5: Step 9



MyPortfolio **Sharing** Planning Reporting Recognition

Share Your Property(ies)

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them.

1 Select Properties to Share
We'll get into the details of the level of access later. For now, which properties do you want to share?
- Select Number of Property(ies) -

2 Select People (Accounts) to Share With
Which people (accounts) do you want to share these properties with? The access for each can be different and you'll be able to specify that on the next page.
Select contacts from my contacts book:
Foster, Nisa
Gopalakrishnan, Nivedita
Homes and Community Renewal
Joshi, Avash

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your **connected contacts** appear in this list.

[Continue](#) [Cancel](#)

Sharing with Accounts
In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data
To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left.

Your Name & Email
After someone accepts your sharing request, they will be able to see your name and email address on their

Figure 6: Step 10

PortfolioManager®

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

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.

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

Sort by: Property Name

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
ESP_test 2 (3946511)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Homes and Community Renewal, New York State	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

Share Property(ies) [Cancel](#)

Sample of portofilio wide benchmarking data, using WEGOWise.



AFFORDABLE MULTIFAMILY HOUSING EFFICIENCY PROJECT

EXPANDING EFFICIENCY IN AFFORDABLE MULTIFAMILY HOUSING—OPPORTUNITY AND CHALLENGES

Making affordable rental housing more energy efficient is a cost-effective way to reduce energy consumption, maintain housing affordability, create healthier and more comfortable living environments for moderate- and low-income families, and reduce pollution. Consider these opportunities in the multifamily sector:

- **Extensive Energy Savings potential:** Multifamily rental buildings, classified as containing 5 or more apartments, are on average older and less energy efficient, and house 15 million American households.¹
- **Financial benefits to low-income Tenants:** Half of the nation's 15 million very low-income renters reside in multifamily housing.² Low-income families can spend up to 20 percent of their income on energy, compared with only 4 percent for the average household.³ Cost-effective energy retrofits have been found to reduce heating fuel and electricity usage by as much as 30 percent, helping renting families afford energy and other basic needs.⁴
- **Improved Health:** Investments in efficiency can create a healthier living environment, lowering incidences of illnesses like asthma, and reduce pollution caused by energy production.⁵
- **Preservation of Housing Affordability:** Owners of affordable multifamily rental properties face high operating and maintenance costs, reducing their ability to invest in their properties. Energy retrofiting multifamily housing preserves affordable homes and frees up capital for maintenance, repairs, and other improvements.⁶ Meeting achievable energy potential by 2020 can create \$9 billion in annual energy savings for tenants and landlords.⁷

Despite these opportunities, efficiency measures are far less likely to be found in multifamily rentals than in any other type of housing.⁸ Why is that the case?

- Owners of affordable housing lack the capital to make efficiency improvements.
- Utilities do not have efficiency programs for multifamily rental housing, and others have not evolved to incorporate new program design breakthroughs. Generally, utility programs are underfunded and fall short of the need.
- Regulations in many states exacerbate barriers to energy efficiency.

Only by coordinating the efficiency and housing sectors can we effectively reduce the energy burden on low-income renters.



Our vision: Electric and gas utilities will deliver programs designed to capture all cost-effective energy efficiency within the affordable housing sector, which will strongly benefit low-income families and building owners as well as utilities



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PARTNERING TO LEVERAGE A NEW OPPORTUNITY

The National Housing Trust (NHT), Natural Resources Defense Council (NRDC), Energy Foundation, Elevate Energy, and New Ecology are working to ramp up energy efficiency investment in affordable multifamily homes. We will be engaging in a dozen states over the next two years, collaborating with local energy and affordable housing partners to ensure that affordable multifamily rental housing receives a fair share of utility funding and that tailored, cost-effective energy efficiency programs are available to all building owners and tenants who want to take part. Our goal is to ensure that electric and gas utilities deliver programs designed to capture all cost-effective energy efficiency within the affordable housing sector, which would benefit low-income families as well as building owners and utilities. Ultimately, we seek to demonstrate that older affordable housing presents excellent opportunities for retrofits that will reliably deliver projected energy savings.

We are selecting states where we can be effective in the short term while building on-the-ground capacity for the long-term efforts. In total, based on an increase in efficiency goals and the need to address the underserved multifamily market, we see a window of opportunity to reach more than 4 million affordable apartments in these states.⁹

So far, they include:

California	Michigan	New York
Illinois	Minnesota	Pennsylvania
Maryland	Missouri	Rhode Island

We are optimistic about the potential to increase utility investment in energy efficiency programs for affordable housing. A growing number of states are mandating aggressive efficiency targets for utilities, and the underserved multifamily market presents a natural opportunity for utilities to meet these goals.

ADDING VALUE TO LOCAL LEADERSHIP

The partnership of our organizations brings together a unique team of specialists with wide-ranging expertise and experience in affordable housing, energy efficiency, collaborative processes, and state agency and utility commission engagement. Our aim is to support the work

of local stakeholders who are already engaged in this effort. Based on the state's needs and opportunities presented to us, we will:

- provide technical capacity on utility program design and implementation, financing, marketing, energy efficiency policy, and advocacy campaigns;
- increase engagement of the affordable housing community with utilities and in regulatory proceedings and other state venues;
- connect utilities, housing finance agencies, economic development agencies, affordable housing groups, banks, and other stakeholders;
- coordinate utility programs' resources with complementary housing programs and resources;
- engage and educate building owners and operators of affordable multifamily buildings; and
- disseminate lessons and best practices from other states.

STRENGTHENING A NATIONAL NETWORK

Finally, we will connect our on-the-ground work in specific states to a national network of diverse and engaged stakeholders. The network will train affordable housing and energy efficiency leaders while facilitating coordination among coalitions and existing networks. This will ensure that best practices, advocacy tools, and other resources are available to the leaders in this space and will secure an ongoing relationship between housing and efficiency advocates—a critical partnership for success.

SECURING WIN-WIN OUTCOMES

We face an important opportunity to achieve significant energy savings and help sustain much-needed affordable housing for our nation's low-income families. Utility spending on energy efficiency programs is expected to increase substantially over the next decade. By effectively targeting these resources to multifamily affordable rental housing, we will help utilities and state governments achieve their energy savings goals, increase housing affordability for low-income households, spur economic growth, and create healthier living environments.

1 http://www.nhc.org/media/files/Recap_NHC_GSE_Core_Functions.pdf.

2 https://www.fanniemaef.com/content/fact_sheet/energy-efficiency-rental-housing.pdf.

3 http://www.benningfieldgroup.com/docs/Final_MF_EE_Potential_Report_Oct_2009_v2.pdf.

4 <http://www.huduser.org/portal/periodicals/em/summer11/highlight1.html>.

5 Rebecca Cohen, *The Impacts of Affordable Housing on Health: A Research Summary* (Washington, D.C.: Center for Housing Policy, 2011).

6 www.db.com/usa/docs/DbLC_Recognizing_the_benefits_of_efficiency_Part_b_1.10.pdf.

7 http://www.benningfieldgroup.com/docs/Final_MF_EE_Potential_Report_Oct_2009_v2.pdf.

8 www.huduser.org/portal/periodicals/em/summer11/highlight1.html; www.nhtinc.org/downloads/partnering-for-success-action-guide.pdf.

9 Census American Consumer Survey, internal calculations.