Key Considerations for Utility Data Access to Support Benchmarking

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As voluntary and mandatory drivers for benchmarking continue to increase at the local and state level, more commercial and multifamily building owners and managers are asking utilities for support in obtaining streamlined access to the whole-building energy consumption data needed to accurately benchmark their properties in EPA's ENERGY STAR® Portfolio Manager® tool. This document provides an overview of key considerations that will guide utilities as they design and deploy customer-facing data access solutions.

Customer Satisfaction

Whole-building data access meets an immediate customer need (i.e., obtaining the consumption information needed to benchmark). In service territories with benchmarking requirements or voluntary benchmarking initiatives, utilities can expect increased demand for data access from commercial and multifamily building owners. However, utility support for benchmarking through data access also serves as a mechanism for longer-term customer engagement. Development of user-friendly, practical, and effective data access solutions presents the opportunity for utilities to position themselves as proactive solution providers, and to enhance customer satisfaction.

Programmatic Integration

Data access solutions that leverage the Portfolio Manager web services application programming interface (API) can send consumption data to customers' property records in Portfolio Manager and can pull back property-level energy performance metrics such as the ENERGY STAR score and whole-building energy use intensity. This allows utilities to leverage customer benchmarking data to better target and deliver EE/DSM program offerings to properties with the highest potential for energy savings and drive ongoing relationships with building owners that can result in future projects.

Data Privacy

Many utilities allow commercial building owners and operators to obtain aggregate whole-building consumption data for benchmarking in Portfolio Manager, while maintaining the privacy of tenant-level consumption data. This requires a process for identifying and "mapping" the meters/accounts at a given property that will be included in the aggregated total. To date, utilities have developed a variety of creative approaches for performing this mapping. Best practice is to allow building owners to be involved in reviewing and confirming the list of meters/accounts that will "roll up" to the aggregate total.

Data Accuracy

There are often "downstream" needs for the review and verification of benchmarking results that use aggregate energy data received from utilities. This includes building owners that are seeking ENERGY STAR certification for their properties, as well as jurisdictions seeking to verify the benchmarking data being submitted under an ordinance. To support this, utilities should provide building owners with an "itemized receipt" documenting the meters or service points that have been included in an aggregate consumption total, without revealing the associated meter-level consumption values. This establishes shared responsibility between the utility and the building owner for review of data completeness and accuracy. In addition, when responding to data requests from owners/operators of buildings with onsite renewable energy generation, utilities must ensure that the aggregate consumption data provided comprises the total consumption of grid electricity – not just net-metered consumption.

Customer Support

While the ENERGY STAR team responds to technical questions regarding the Portfolio Manager tool and the Portfolio Manager web services API, many of the questions from data requestors will be related to the utility's specific approach to designing and deploying their data access solution. For this reason, it is important that utilities develop clear user guidance for their systems and bolster this with a phone- and/or email-based pathway for users to obtain technical assistance.

Collaborative Design

Developing a data access solution – especially one that leverages the Portfolio Manager web services API – will likely require the involvement of an IT team. However, data access to support benchmarking is not purely a technical undertaking. The most successful deployments are those that recognize the cross-functional nature of benchmarking, and that seek to engage a full range of relevant utility stakeholders, which may involve IT, Billing, Analytics, Customer Service, Energy Efficiency/Demand Side Management, and/or Policy/Legal/Regulatory. This enhances the likelihood that the end product will meet utility and customer needs, and not simply achieve minimum technical viability.