



# **MIP NOTICE: Lenders' Questions**

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# Q: DATA COLLECTION PLANS

When Utilities Do Not Provide Whole Building Data

- New Construction & Substantial Rehab
  - Include utility monitoring gear in plans & specs.
- Section 223(f) with ECMs
  - Include utility monitoring gear as above
- Certification Obtained Prior to Application
  - Assuming no utility monitoring gear in place
  - Pre-select unit sample
  - Lease obligation of tenants
  - Management's recording methods

# Data Collection Plan Template?

- How is data obtained?
  - How, who, when, in writing
  - Confirmable, auditable
- Does the data meet requirements?
  - 12 months
  - Construction complete, normal occupancy
  - 100% whole building/whole property data
  - Or approvable sample
- Can you do it again....and again?
- Who will maintain/report data?

# Data: Typical Issues Seen

- Uncertain data source:
  - “Jane at ABC Power reported xxxx”
- Data does not meet requirements:
  - No detail, no list of meters
  - Project still in lease-up
  - Not all energy use reported
- Property or CNA does not match ENERGY STAR app.
  - Sq Ft not accurate
- Uncertain access to future data
  - “Joe said he’d help us out next year.”

# SEPs for ENERGY STAR Existing Building Certification

- How was data obtained?
  - How, who, when, in writing
  - Confirmable, auditable
- Does the data meet requirements?
  - 12 months
  - Construction complete, normal occupancy
  - 100% whole building/whole property data
- Can you do it again....and again?

# Tenant Behavior?

- ENERGY STAR score based on sample properties
  - Properties had all kinds of tenants
  - Scoring reflects all kinds of tenants
- Onsite Staff & Tenant Education
  - Common sense
  - New or advanced technology
- Owner's Example
  - Do staff & tenants know owner values conservation?

# Sanctions for scores <75?

- Plan to exceed the minimum
- Build conservation into RfR planning
- Educate & Incentivize Mgmt Staff & Tenants
- Low score?---Get a diagnosis & a plan
- Still low—Upgrade components
- Still low—Try again
- Still low --- maybe a 2530...you volunteered, you said you could earn the score.
- Lenders: Do you have more than one of these?