2012 Multifamily Market Research Energy and Water Survey

INSTRUCTIONAL BOOKLET

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PORTFOLIO MANAGER INFORMATION

If your building is completely and accurately entered in Portfolio Manager under the Multifamily space type, you have the option to share your building within Portfolio Manager to the **MFenergywatersurvey** Master Account and skip the questions that ask for the information already entered in your facility benchmark (marked with a ★ on this survey).

Before deciding to utilize this option, please ensure that:

- The data in your Portfolio Manager account is complete for 2011;
- Energy data is provided for at least 12 consecutive months in the period between December 1, 2010 to January 31, 2012;
- The energy data represents the consumption for the entire property, including common area, tenant units, and retail/commercial space;
- The energy data must include all fuels (electricity, natural gas, fuel oil, etc.);
- All property characteristic data is provided with accurate, updated data, including all optional space characteristics; and,
- Any applicable sub-space data, such as parking and/or swimming pools, have been completely and accurately entered.

For any data not in your Portfolio Manager account, but requested in this survey, please add it to your Portfolio Manager account or provide it in your survey response.

In order for ICF to access your Portfolio Manager multifamily property data for the survey, you must share it with the MFenergywatersurvey Portfolio Manager account.

Portfolio Manager Sharing Instructions

1. Log in to your Portfolio Manager account at www.energystar.gov/benchmark.

2. From the My Portfolio page, select **"Share Facilities"** which is located under "Work with Facilities" on the upper third of the screen.

3. On the "Select User or Master Account" page, select **"Multifamily Energy and Water Survey - MFenergywatersurvey"** in the pull down menu. Click **Add and Modify**.

4. Select the appropriate access rights.

   a. Under Access Role, click "Read Only".

   b. Under Optional Rights, click "no" for all three options.

   c. Select **Continue.**

   The rights recommended above ensure that the data can only be extracted. It cannot be edited or shared with other Portfolio Manager accounts.

5. In the "Select Facilities to Share" column, select the checkbox of each facility that is to be shared for the purpose of the survey. If all facilities are to be shared, select the "Select All" box at the top of the column.

6. Review the rights that will be granted to the user for the selected facilities and select the **Continue** button. The Confirmation page will open.

7. Review the facilities and access rights being granted. Select the **Save** button. You will be notified that an e-mail has been sent on your behalf to the master account.

ENERGY AND WATER DATA SUBMISSION OPTIONS

The following three options are available for submitting your energy data.

Option A: Portfolio Manager - for energy data only

- If you are providing full or partial energy data through Portfolio Manager, you must fill out the table on page 15 in the survey.
- Use the key provided on page 15 to help fill out the survey.
- See the table below for an example of a Portfolio Manager account with 3 meters, two of which are electricity and one of which is natural gas.
- If your meter ID number is more than 10 digits/letters, please enter the last 10 digits.

Example

Meter ID	Fuel Type	Space Served	Paid By
45658940002	01	01	04
45658980009	01	02	02
45658910008	04	05	04

Option B: Submit data in an Excel file.

Go to https://www.efanniemae.com/mf/green/survey.jsp and download the Energy and Water data file.

Option C: Paper Copy - Energy Data

- Provide all energy consumption and cost data in the "Energy" Table on page 16 of the survey. Include all fuel types (e.g. electricity, natural gas, fuel oil, etc.).
- If you are providing monthly, quarterly, or semi-annual data, enter the dates, consumption, total cost, and units, as they appear on your energy and water bills.
- Cost should include all fees, taxes, and other related service charges.
- Use the key below to fill in the appropriate fields. Use the example table above for Portfolio Manager data as guidance in filling out the energy table.

ENERGY TABLE KEY

Fuel Type	Unit of Measurement	Space Served	Paid By
01 Electricity (Grid Purchase) 02 Electricity (On-Site Solar) 03 Electricity (On-Site Wind) 04 Natural Gas 05 District Steam 06 Wood 07 Kerosene 08 Fuel Oil (No. 1) 09 Fuel Oil (No. 2) 10 Fuel Oil (No. 4) 11 Fuel Oil (No. 5 and No. 6) 12 Coal (anthracite) 13 Coal (bituminous) 14 District Hot Water 15 District Chilled Water 16 Other	01 kBtu (thousand Btu) 02 Mbtu (million Btu) 03 kWh (kilowatt hour) 04 MWh (megawatt hour) 05 ccf (hundred cubic feet) 06 kcf (thousand cubic feet) 07 Therms 08 Lbs 09 kLbs 10 Gallons 11 Liters 12 Barrels 13 Tons 14 Ton Hours	01 Common space only 02 Residential (tenant) space only 03 Commercial/ Retail Space 04 Multiple spaces (for any combination of the above 3 spaces) 05 Whole Property	01 Owner 02 Residential Tenant 03 Commercial/ Retail Space 04 Multiple parties 05 Other

Option C: Paper Copy - Water Data

- Provide all water data in the "Water" Table on page 17 of the survey. You must fill in all blank fields.
- Enter the dates, consumption, total cost, and units, as they appear on your water bills.
- Water consumption data must include clean water consumption (i.e. water that is not wastewater/sewer water).
  - If metered separately, break out meters by type of water use. For example, separately list meters providing "Municipally Supplied Potable Water - Indoor" from "Municipally Supplied Potable Water - Outdoor". If consumption of Municipally Supplied Potable Water includes both indoor and outdoor use, select "Municipally Supplied Potable Water - All" as the type of water use.
- Alternative water generated on-site includes wells, retention ponds, and rainwater harvesting such as rain barrels and cisterns.
- Cost should include all fees, taxes, and other related service charges. Water costs must also include waste water/sewer charges.

WATER TABLE KEY

Type of Water Use	Unit of Measurement	Paid By
01 Municipally Supplied Potable Water – Indoor Use **02** Municipally Supplied Reclaimed Water – Indoor Use **03** Alternative Water Generated On-Site – Indoor Use **04** Other – Indoor Use **05** Municipally Supplied Potable Water – Outdoor Use **06** Municipally Supplied Reclaimed Water – Outdoor Use **07** Alternative Water Generated On-Site – Outdoor Use **08** Other – Outdoor Use **09** Municipally Supplied Potable Water – All Uses **10** Municipally Supplied Reclaimed Water – All Uses **11** Alternative Water Generated On-Site – All Uses **12** Other – All Uses	**01** ccf (hundred cubic feet) **02** cf (cubic feet) **03** gallons **04** kcf (thousand cubic feet) **05** kgal (thousand gallons) **06** Mcf (million cubic feet) **07** Mgal (million gallons)	**01** Owner **02** Residential Tenant **03** Commercial/Retail **04** Multiple parties **05** Other

SURVEY DEFINITIONS & GUIDANCE

Q4: Primary property types present at your property

- **Rental:** A building with more than four units in which tenants make a monthly payment and have no title to the unit where they reside.

- **Cooperative or Co-op:** A residential or mixed-use building wherein a corporation or trust holds title to a group of housing units and the common areas for the use of all the residents. The individual participants own a share in the cooperative which entitles them to occupy an apartment as if they were owners, to have equal access to the common areas, and to vote for members of the Board of Directors which manages the cooperative.
- **Condo:** A building with a form of property ownership where the purchaser receives title to a unit in a multi-unit building and a proportionate share in common areas.

Q5: Resident populations

- **No majority population/general purpose housing:** The property is not inhabited by any dedicated population. This includes properties that are primarily occupied by single individuals and families.

- **Military Housing:** A Military Housing Property is a multifamily rental property in which the units are occupied by persons serving in or employed by the military or that is located in an area where military and military related employment accounts for 20 percent or greater of the local employment base.

- **Student Housing:** A Student Housing Property is a multifamily rental property in which the units are leased to undergraduate and/or graduate students.

- **Senior/Independent Living Housing:** Independent Living Communities are rental properties restricted to the elderly that also provide limited programs of assistance with domestic activities (meals, housekeeping, activities, transportation, etc.). Typically, a unit in an Independent Living Community resembles a standard market unit.

  Independent Living Communities generally are not licensed and generally do not provide assistance with Activities of Daily Living (ADLs) or healthcare. Activities of Daily Living (ADLs) are services provided in connection with the management of medications and assistance with bathing, dressing, toileting, ambulating, eating and other similar activities.

- **Special Accessibility Needs:** Residents living in the property are covered by the American Disabilities Act.

Q20- Q23: Floor Area

Q20: Gross internal floor area

Gross floor area is measured between the principal exterior surfaces of the enclosing fixed walls of all buildings. Include all common area spaces, residential tenant units, and basements (livable and non-livable by tenants), and also rentable square footage of retail and commercial spaces.

- If numbers are not readily available, you may consult building drawings and blue prints, use a measuring wheel to measure units, and add the rentable square footage and common area square footage.

Q21: Floor area of residential space

To find the **floor area** of residential space, sum the square footage of all units.

Q22: Common area spaces

Common area spaces includes: engineering rooms, utility closets, hallways, stairways, connecting corridors between buildings, community rooms, staff offices, lobbies, atria, entryways, cafeterias, kitchens in shared recreation/community rooms and staff offices, storage areas, elevator shafts, indoor pools, fitness rooms, lounges, and enclosed tennis courts.

- Do NOT count as **common area** any floor space that is located within any occupied or unoccupied apartment or retail/commercial spaces.

Q24: Parking

- Indicate the total square footage of each type of parking area. *Do not use floor area estimates.* Parking floor area can be verified by obtaining information from building blue prints, resurfacing project reports, using a measuring wheel, or by counting parking spaces and accounting for driving lanes. Estimating based on aerial photographs, such as from Google Earth, is not recommended.

Q24a: Open parking

Open parking is an area without a solid roof, walls and ventilation. Open parking does include partially enclosed spaces such as a surface lot with sun shades or tin roofing with a light.

Q24b: Non-enclosed parking

Non-enclosed parking is an area with an overhead covering but no walls and no ventilation requirements. It includes a multilevel parking structure that requires light during daytime hours.

Q24c: Enclosed parking

Enclosed parking is an area with an overhead covering, walls and ventilation requirements. This is typically an underground garage.

"Tuck under" parking is considered fully enclosed.

Q24d: Parking Access

If parking can be accessed by residents 24 hours a day, 7 days a week, please insert 168.

Q25: Building Type Table

See below for an **example** of a property with 3 buildings:

25a. Building Type	25b. Number of buildings this applies to	25c. Number of floors above ground	25d. Number of floors below ground	25e. Number of units per building
● High-rise ○ Mid-rise ○ Garden ○ Towngarden ○ Townhouse ○ Single Family ○ Other	2	10	1	100
● High-rise ○ Mid-rise ○ Garden ○ Towngarden ○ Townhouse ○ Single Family ○ Other	1	7	3	70

Building Type Definitions

- **High-rise building:** A single structure of ten or more stories containing five or more separate dwelling units.
- **Mid-rise building:** A single structure of five to nine stories containing five or more separate dwelling units.
- **Low-rise building:** A single structure of one to four stories containing five or more separate dwelling units.

- **Garden:** One structure of one to four stories containing five or more separate dwelling units that is part of a group of buildings that surround at least one lawn or courtyard.

- **Towngarden:** One structure in a series of attached structures, each of which contain one to four stories and one to four separate dwelling units, that is part of a group of buildings that surround at least one lawn or courtyard.

- **Townhouse:** One structure in a series of attached structures, each of which contain one to four stories and one to four separate dwelling units.

- **Single family home:** An individual, detached structure of one to four stories containing one to four separate dwelling units.

Q25b: What constitutes a single building?

Buildings that have multiple towers connected by common concourse levels and/or hallways are considered a single structure if there are common areas that cannot truly be divided or separated among the towers. For example:

- A Multifamily property has three stories of common space including an atrium, a restaurant, and seamless connections between two towers. This IS considered a complete and indivisible connection, and therefore considered to be one building. Enter this as one building in the survey and the number of stories in the tallest building for the number of floors above ground.

- A Multifamily property consists of two buildings connected by an outdoor (covered) walkway. This IS NOT considered a complete and indivisible connection, and therefore should be entered as two buildings in the survey.

- A Multifamily property consists of two buildings connected by underground walkways "tunnels" that allow residents to move between the buildings without being exposed to the outside weather. This IS NOT considered a complete and indivisible connection, and therefore should be entered as two buildings in the survey.

Q25c and d: Stories above and below ground

- The stories **below ground** represent any floors partially or completely below ground, and the stories **above ground** includes all floors above ground. Do not count parking garages below ground as a floor.

- A **basement** is defined as a floor below ground that is not living space.

Q26: Unit count

- The number of units includes every type of space livable by a resident including the super's or manager's apartment, model units, vacant, occupied and down units.

Q26a: Studio/efficiency/junior bedroom units

- Include both studio units and efficiency units in this category. They should have a kitchen/living area with a separate bathroom. Also include junior bedrooms in this category. Junior bedrooms have a separate space for sleeping that is usually separated by a half wall or temporary wall.

Q31: Percentage of units with kitchens

- **A kitchen** should be counted if it has a stove top/cook top, at least one cupboard, small counter space, any size refrigerator and a sink (separate from the bathroom sink).

Q33: Payment of Energy and Water Systems

- The Ratio Utility Billing System (RUBS) is a method of allocating utility costs (water, gas electricity, etc.) among residents. The calculation is based upon one or more factors such as square footage or number of occupants.