

Borrowers with Local or State Benchmarking Requirements: How to Submit 2023 Energy Performance Metrics in 2024

Depending on the size and location of your multifamily property, you may be required to benchmark by law. Benchmarking entails submitting your energy and water consumption and cost data to your city or state. **If your property is in a city or state that requires benchmarking and the property has a Fannie Mae Loan, you are required to submit 2023 Energy Performance Metrics (EPMs) to Fannie Mae in 2024.**

In 2024, properties in the following jurisdictions are required to:

- Benchmark by law by submitting their 2023 energy and water cost and consumption data to cities.
- Submit their 2023 energy and water consumption and cost data to Fannie Mae.
- Green Mortgage Loans report to Fannie Mae through the Green Measurement and Verification Service and are not required to follow these requirements.

Each city, town, or state below is linked to their benchmarking law’s website with compliance instructions.

Benchmarking Laws and Requirements for Properties Required to Submit EPMs in 2024			
Ann Arbor, MI	20,000+ SF	Kansas City, MO	50,000+ SF
Aspen, CO	20,000+ SF	Lexington, MA	25,000 + SF
Atlanta, GA	25,000+ SF	Los Angeles, CA	20,000+ SF
Berkeley, CA	15,000 + SF	Miami, FL	50,000+ SF
Bloomington, MN	75,000+ SF	Minneapolis, MN	50,000+ SF
Boston, MA	15+ units or 20,000+ SF	Montgomery County, MD	25,000+ SF
Boulder, CO	20,000+ SF	New Jersey	25,000+ SF
Brisbane, CA	10,000 + SF	New York, NY	25,000+ SF
California	50,000+ SF	Oak Park, IL	10,000 + SF
Cambridge, MA	50+ units	Orlando, FL	50,000+ SF
Chelsea, MA	20+ units or 20,000+ SF	Philadelphia, PA	50,000+ SF
Chicago, IL	50,000+ SF	Portland, ME	20,000+ SF (single-tenant buildings)
Chula Vista, CA	20,000+ SF	Reno, NV	30,000+ SF
Colorado	50,000+ SF	San Diego, CA	17+ Residential accounts and 50,000+ SF
Columbus, OH	50,000+ SF	San Francisco, CA	50,000+ SF
Denver, CO	25,000 + SF	San Jose, CA	20,000+ SF
Des Moines, IA	25,000+ SF	Seattle, WA	20,000+ SF

Detroit, MI	100,000 + SF	South Portland, ME	20,000+ SF
Edina, MN	25,000+ SF	St. Louis, MO	50,000+ SF
Evanston, IL	20,000+ SF	St. Louis Park, MN	25,000+ SF
Honolulu, HI	50,000+ SF	St. Paul, MN	50,000+ SF
Indianapolis & Marion County	50,000+ SF	Washington D.C.	25,000+ SF
Fort Collins, CO	5,000+ SF		

Key Terms

Before beginning this process, it's helpful to familiarize yourself with the following terms.

ENERGY STAR Portfolio Manager

ENERGY STAR® Portfolio Manager® is a secure online tool used to measure and track energy and water consumption, costs, and greenhouse gas emissions. Users can benchmark their property's and portfolio's performance on this tool. It assists in every step of your energy management program, helping to set baselines, identify goals, and track improvements. ENERGY STAR Portfolio Manager created a guide for new users, which you can access [here](#).

This tool can also help you gain you recognition from the EPA for energy or water efficiency improvements. You can access ENERGY STAR Portfolio Manager at www.energystar.gov/portfoliomanager.

Energy Performance Metrics

Energy Performance Metrics (EPMs) are used to track energy and water over time to demonstrate how they impact a property's bottom line. Fannie Mae requires:

- **Source Energy Use Intensity (EUI):** A metric representing the annual energy used at a property per square foot (kBtu/ft²).
- **ENERGY STAR® Score:** A 1 to 100 score created by ENERGY STAR Portfolio Manager that summarizes the energy performance of a multifamily property.
- **Water Use Intensity:** A metric representing the annual water used at a property per square foot (gal/ft²).
- **EPA Water Score:** A 1 to 100 score created by ENERGY STAR Portfolio Manager that summarizes the water performance of a multifamily property.

Third-Party Utility Service Providers

Some Fannie Mae Borrowers use a third-party utility service provider to assist with data collection and submission. Several qualified firms specialize in utility data collection, using ENERGY STAR Portfolio Manager to submit EPMs to Fannie Mae and to comply with local laws. If you use a third-party utility service provider, share these instructions to ensure that they can help you with Fannie Mae's EPM reporting requirement.

Bright Power

Bright Power is a national energy and water efficiency firm chosen by Fannie Mae to support Borrowers that must submit their EPMs to Fannie Mae in 2024.* Bright Power has extensive expertise in implementing and evaluating energy and water efficiency improvements and benchmarking multifamily properties. If you have questions throughout this process, contact Bright Power for support at FannieMae@brightpower.com.

Direct Reporting not Required for Green Mortgage Loan Borrowers

All Green Mortgage Loans, including those in benchmarking jurisdictions, report through the Green Measurement and Verification Service. Thus, Green Mortgage Loans are not required to follow these requirements. Instead, they should engage in Fannie Mae's Green Measurement and Verification Service to meet the obligations of their loan. Green Mortgage Loan Borrowers should visit Fannie Mae's website for more information on the Green Measurement and Verification Service.

** Please note that Bright Power is not contracted to assist Borrowers with local law compliance, but Borrowers are welcome to contract Bright Power separately for such assistance.*

Submit your property's EPMs to Fannie Mae in three easy steps

Follow these steps to submit your 2023 energy and water consumption and cost data to Fannie Mae in 2024. Enter energy, water, and property data into ENERGY STAR Portfolio Manager.

1. Enter energy, water, and property data into ENERGY STAR Portfolio Manager.
2. Generate and Submit EPM report on ENERGY STAR Portfolio Manager to Fannie Mae.
3. Share your property with Fannie Mae on ENERGY STAR Portfolio Manager.

Step 1: Enter energy, water, and property data into ENERGY STAR Portfolio Manager

To complete this step, you will need:

- Your ENERGY STAR Portfolio Manager account information
- Basic details about your property's type and usage including the irrigated area
- Energy and water consumption and cost data between January 1 and December 31, 2023
- Fannie Mae Loan Number: a unique number provided by Fannie Mae for your loan

At the end of this task, you will have a complete ENERGY STAR Portfolio Manager account set up for your property or properties and you'll receive your Property ID. Your Property ID is a unique property identifier generated by ENERGY STAR Portfolio Manager.

1. Log in to or set up your ENERGY STAR Portfolio Manager account.
 - a. Visit www.energystar.gov/portfoliomanager and log in or set up your ENERGY STAR Portfolio Manager account.
2. Enter general information about your property's profile.
 - a. If your property's profile is already set up, skip to step 3.
 - b. Click *My Portfolio*.
 - c. Click *Add a Property*.
 - d. Choose *Your Property Type*, *Your Property's Buildings* and *Your Property's Construction Status*.
 - e. Click *Get Started* to enter your property's size, uses, and irrigated area. You will enter information in both the *Basic Information* and *Property Details* tabs.
 - i. Refer to the [EPA's one-pager](#) on Irrigated Area and Water Use Tracking in ENERGY STAR Portfolio Manager to find a detailed definition of irrigated area and suggested methods for determining this value.
3. Add your Fannie Mae Loan Number.
 - a. Go to *Details*, then *Unique Identifiers (IDs)*.
 - b. In the first *Custom ID* field available, enter your Fannie Mae Loan number in *ID field*, then name this field "Fannie Mae Loan Number."

4. Enter your property's energy and water cost and consumption data.

- a. Access your utility data through your online utility account or utility bills to collect data for January 1 to December 31, 2023.**
- b. Visit the *Energy* and *Water* tabs in the property profile.
- c. If submitting for the first time, click *Add a Meter* to enter meter information.
- d. Click on a meter to enter units and the first bill date, then provide 12 consecutive months of energy and water cost and consumption for your entire property.
- e. Select the meters on the *Select Meters to Include in Metrics* page and click *Apply Selections*.

**If any data is sampled instead of historical, you must indicate “Estimated” for meter entry.

Step 2: Generate and Submit EPM report on ENERGY STAR Portfolio Manager to Fannie Mae

To complete this step, you will need your ENERGY STAR Portfolio Manager account information. At the end of this task, you will have submitted your EPMs to Fannie Mae through Fannie Mae’s EPM reporting form.

1. When logged into ENERGY STAR Portfolio Manager, click this [link](#) to access the “Fannie Mae Energy Performance Metrics 2023 (for 2024 submission)” reporting form.
2. You may also enter this URL into your web browser:

<https://portfoliomanager.energystar.gov/pm/reports/dataRequest/respond/69367?testEnv=false>.

Select the appropriate options on the EPM reporting form.

- a. If you are the property owner, choose *Myself*. If not, choose *Someone Else*, then enter the owner’s information.
- b. The timeframe will automatically be selected to ensure Fannie Mae collects all of 2023’s data for 2024 submission.
- c. You have the option to submit EPMs for one or multiple properties.
 - i. Select *One Property* or *Multiple Properties*.
 - ii. Click *Select Properties* to choose which properties to include in your submission.

3. Click **Generate Response Preview**.

- a. If your data is complete, this step is completed
- b. If your property is missing data, you may get a notification preventing you from continuing this process. If so, click *Read More* to discover where there is incomplete data.
- c. If you updated any data, you will need to generate a new response.
 - i. Return to the *Reporting* tab.
 - ii. Locate the 2023 Fannie Mae EPM report in the list.
 - iii. Visit the *Action Menu* and select *Generate an Updated Response*.

Step 3: Share your property with Fannie Mae on ENERGY STAR Portfolio Manager

This step requires Fannie Mae to accept your request to connect on ENERGY STAR Portfolio Manager. This process is simple, but usually takes one business day. You will need to sign into ENERGY STAR Portfolio Manager on two separate occasions to complete this step. To complete this step, you will need your ENERGY STAR Portfolio Manager account information.



At the end of this task, you will have shared your property with Fannie Mae, which offers Fannie Mae a comprehensive understanding of your property's performance. Completing this step brings you into full compliance with this requirement of your Fannie Mae Mortgage Loan.

1. Add Fannie Mae as a contact on ENERGY STAR Portfolio Manager.

- a. Click *Contacts*, then *Add Contacts*.
- b. In the *Username* field, enter FANNIEMAE2, then look for Fannie Mae (Energy Performance Metrics). There are many ENERGY STAR Portfolio Manager accounts associated with Fannie Mae. It is crucial to ensure that you request FANNIEMAE2.
- c. Click *Connect*.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

2. Once your connection request is accepted (within 1 business day), log in to share your property with Fannie Mae.

- a. Under the *Sharing* Menu, click *Share Property*.
- b. Choose all of your properties that have Fannie Mae loans with local or state benchmarking requirements.
- c. Select the FANNIEMAE2 account to share.
Specify the sharing level as LEVEL:
 - i. Bulk sharing
 - ii. Read only access
- d. Click *Share Properties*