TAMPA HOUSING AUTHORITY’S APPROACH FOR ONGOING UTILITY BENCHMARKING

SOLUTION OVERVIEW
Tampa Housing Authority (THA) has a modest portfolio with only one fuel source and one utility service provider. In total, its HUD-assisted housing portfolio consists of 14 properties with 3.2 million square feet of multifamily housing. Although THA’s portfolio is smaller than the average Better Buildings multifamily portfolio (67 properties/5.2 million square feet), significant challenges prevented the housing authority from mastering both the basic and advanced features of Portfolio Manager. THA’s principal challenges were limited staff availability, a lack of familiarity with the utility benchmarking process, and little experience with Portfolio Manager. In addition, THA’s portfolio includes a complex mix of common area and residential utility meter types – more than 1,500 meters from which THA would have to collect, organize, aggregate, and upload utility data on a monthly basis to fully realize the benefits of benchmarking through Portfolio Manager. With the help of its Better Buildings Challenge Account Manager, THA successfully created a Portfolio Manager account and implemented a process for ongoing utility benchmarking of its portfolio.

ORGANIZATION TYPE
Public Housing Authority

BARRIER
Lack of staff time and institutional knowledge to benchmark energy consumption

SOLUTION
Create a strategy to “stand up” a new Portfolio Manager account and identify key staff members to maintain the account

OUTCOME
Successfully utilized existing Portfolio Manager training tools and templates to upload property data while simultaneously developing monthly data sharing protocols with the electric utility provider

POLICIES
Tampa Housing Authority instituted three new policies to ensure that its benchmarking efforts

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would continue in an organized manner and provide timely and accurate data.

- THA established a monthly check-in call with its utility provider, TECO, to ensure data sharing on a monthly basis.
- The THA benchmarking team began working with THA’s IT department on a monthly basis to verify the accuracy of the aggregated data.
- THA staff began regularly checking in with their BBC Account Manager to review THA’s data sharing status and energy consumption trends.

**PROCESS**

Prior to the development of U.S. Department of Housing and Urban Development’s (HUD) Multifamily Utility Benchmarking Toolkit, THA consulted Portfolio Manager’s online resources to guide its early benchmarking efforts. Although THA had succeeded in adding a few properties and some utility consumption data into Portfolio Manager, it had not yet developed a comprehensive plan for benchmarking its portfolio on an ongoing basis. After several years of benchmarking on its own, THA requested and received technical assistance (TA) through the Better Buildings Challenge, which allowed the housing authority to create and execute a portfolio-wide benchmarking plan.

As THA’s TA Provider, ICF set up regular meetings with THA to check in on the housing authority’s benchmarking progress and work through any issues. THA assembled a transition team to collect the information required to input property- and meter-level data into Portfolio Manager. THA appointed one staff member to lead the data transition team and another to process all utility data moving forward.

After assembling all of its property-level data, THA reviewed the data quality and entered it into Portfolio Manager bulk upload templates. THA ensured that all data points required by the BBC were reported, and that it met HUD’s desire to see energy use intensity (EUI), water use intensity (WUI), and ENERGY STAR Scores. Although THA’s TA Provider directed much of the efforts, THA staff members were encouraged to take ownership of the process to build capacity within the housing authority. After completing and reviewing the bulk upload templates, THA successfully uploaded templates for properties, use details, and meters into Portfolio Manager.

The final step in the Portfolio Manager set-up process, which is also a recurring benchmarking task, was uploading utility data for THA’s properties, which TECO provided in a format that was disaggregated from the buildings or properties that they serviced. TECO did not aggregate utility consumption for properties because account and meter numbers frequently change, causing automated sorts to become outdated after a short period of time. In addition, TECO upgraded its computer systems and its billing and account coding formats in 2016, which further complicated THA’s efforts to obtain aggregated utility data.
THA had entered 21 properties into Portfolio Manager and needed to find a common identifier from the 1,500 rows of TECO data to begin aggregating them into properties. For the 2015 and 2016 data, THA matched property addresses to corresponding properties in Portfolio Manager, since meter and account numbers had changed several times. With more than 1,500 meters servicing all of THA’s properties, it was no small effort to track and report historical data for past years. Unfortunately, THA had to undertake this effort knowing that TECO would be changing its data sharing format in January 2017 as part of a computer system upgrade. Moving forward, TECO would provide a new permanent “service identifier” in the monthly data dumps for each meter/account that would remain constant regardless of changes to meter numbers, account numbers, or the address. After the system upgrade, THA would have to associate all of its meters to properties once again. With their newfound understanding of benchmarking, this process was significantly more efficient than the first effort, and THA staff completed the task in a few hours rather than over multiple days.

THA created several unique meter entries for each of its properties, allowing staff to track all common area meters separately from the single residential meter for aggregated apartment-level data on a monthly basis. THA selected this approach so that it could track separately metered energy loads and/or specific space types at its properties. For example, THA has created separate meters to track consumption associated with elevators, common area lights, outdoor lights, maintenance rooms, and residential spaces. This approach facilitates a greater level of granularity when analyzing consumption data and allows Portfolio Manager to generate weather normalized energy use intensity (EUI) ratings.

OUTREACH
THA held an onsite Portfolio Manager training event for its staff led by its TA Provider, which provided all staff members with a basic understanding of benchmarking and a common language.

THA facilitated a meeting with its TECO account representative, a TECO IT staff member, the THA benchmarking team, and THA’s TA Provider to develop a strategy for obtaining regular aggregated utility data.

TOOLS AND RESOURCES
Many of the lessons learned from THA’s benchmarking experience helped direct the development
of HUD’s Multifamily Utility Benchmarking Toolkit, which is a one-stop-shop for multifamily housing providers with detailed benchmarking guidance and dozens of helpful tools and resources.

THA relied on several Portfolio Manager resources to set up its account, including resources found on the Use Portfolio Manager page and the Training page. THA used Portfolio Manager’s bulk upload templates for properties, use details, meters, and consumption data.

OUTCOMES
At the end of the benchmarking effort, THA had successfully registered all of its properties and uploaded two years’ worth of utility data into Portfolio Manager. THA also created protocols for aggregating utility data for each property. Historic utility data (2015 and 2016) was aggregated using property addresses and all data for future years will be aggregated using TECO’s newly-established property ID numbers. Looking ahead, THA is developing a monthly schedule for receiving, aggregating, and uploading data from TECO to Portfolio Manager. Finally, THA is exploring the best ways to use this information to understand its energy consumption and identify energy saving opportunities.

MEASURING SUCCESS
THA requested TA through the Better Buildings Challenge to progress from limited benchmarking to an automated process for tracking and understanding its portfolio-wide energy consumption. THA achieved this goal by obtaining and entering two years’ worth of aggregated electric consumption data into Portfolio Manager and by establishing procedures between THA staff and TECO staff to ensure utility data is received and entered on a continual basis moving forward.