Additional Guidance for Residential Properties

This document provides additional details on how to benchmark residential properties in ENERGY STAR Portfolio Manager and includes information about the specific fields requested for multifamily housing properties. For step-by-step guidance on how to comply with Chicago Energy Benchmarking, refer to the *Benchmarking Guide*, available at www.CityofChicago.org/EnergyBenchmarking.

There are three types of use detail fields in Portfolio Manager:

1. *Required Inputs for All Properties*: general inputs required by Portfolio Manager for all properties. You cannot proceed without entering a value. These fields are listed below and additional information is provided on pages 2-3:
   - Primary property use type;
   - Number of buildings on the property;
   - Property address;
   - Year built;
   - Occupancy rate;
   - Total gross floor area;
   - Gross floor area for each property use type.

2. *Required Use Details for Specific Property Types:* inputs required to receive an ENERGY STAR score (for eligible property use types), and also required under the Chicago Energy Benchmarking Ordinance. If left blank, Portfolio Manager relies upon default values to generate the ENERY STAR score (see additional information about default values below). For MULTIFAMILY HOUSING these required fields are listed below and described in more detail on page 4:
   - Total number of residential living units;
   - Number of living units in a low/mid/high-rise setting (choose one);
   - Number of bedrooms.

3. *Optional Use Details*: additional use details that can be tracked in Portfolio Manager but do not affect your property's ENERGY STAR score or any other energy metric. If you don't have actual values for these fields, you can enter your best estimate or leave them blank. For MULTIFAMILY HOUSING these fields are listed below and described in more detail on page 5:
   - Resident population type;
   - Government subsidized housing;
   - Number of laundry hookups in all units;
   - Number of laundry hookups in common area(s);
   - Percent that can be heated/cooled.

Note that a list of all property use details for each use type is available at: www.EnergyStar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details. Required fields are marked with an asterisk.

Using estimated values and default values

The Chicago Energy Benchmarking ordinance requires you to make a good-faith effort to enter actual values in all required fields in order to have accurate benchmarking results. If, despite your good-faith effort, you are unable to obtain actual values, you can use Portfolio Manager's defaults where available, provided you check the USE A DEFAULT checkbox. For optional input fields that do not affect your ENERGY STAR score or other energy metrics, you can enter your best estimate if you don't have an actual value.

1. Required Inputs for All Properties

The following guidelines are specific to residential properties. For guidance on other fields that are common to all property use types, refer to the *Benchmarking Guide*.

Primary property use type

Most residential buildings fall under the MULTIFAMILY HOUSING property use type. MULTIFAMILY HOUSING refers to residential buildings that contain two or more residential living units, each containing a separate full kitchen and bathroom. These properties may include high-rise buildings (10 or more stories), mid-rise buildings (5 to 9 stories), low-rise buildings (1 to 4 stories), townhomes broken into two or more units, or duplex homes. Occupants of these buildings may include tenants, cooperators, and/or individual owners. A different property type is more appropriate in the following cases:

- Senior housing:
  - *Skilled nursing or assisted living*:
    - If your property provides skilled nursing and/or assisted living for 50% or more of the units, you should select the SENIOR CARE COMMUNITY property use type. You should include all space and use details of your property under this property use type, including any independent living that may be present.
    - If your property provides skilled nursing or assisted living for less than 50% of the units, you should select MULTIFAMILY HOUSING as the primary property use type, and add SENIOR CARE COMMUNITY as a secondary property use type.[1]
  - *Independent Living*: If your property is a retirement community or senior housing that provides independent living, you should select the MULTIFAMILY HOUSING property use type. Independent Living Communities generally are not licensed and generally do not provide assistance with Activities of Daily Living (ADLs) or healthcare, such as the management of medications and *assistance* with bathing, dressing, toileting, ambulating, eating and other similar activities; they may provide limited programs of assistance with domestic activities (meals, housekeeping, transportation, etc.).
- Student housing: Incudes properties *associated with an educational institution* that offer long-term accommodation for undergraduate and/or graduate students:
  - If your property includes common areas and either shared kitchens or no kitchens, you should select the RESIDENCE HALL/DORMITORY property use type.

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[1] In this situation, the floor area of hallways and units for assisted living and any community areas specifically used to assist residents (e.g. nursing stations, exam rooms, physical therapy rooms, etc.) should be identified as the SENIOR CARE COMMUNITY property use type. The floor area of hallways and units for independent living along with any open common areas that are used by residents of both the independent and the nursing/assisted living units (e.g. game rooms or restaurants) should be identified as the MULTIFAMILY HOUSING property use type.

- o If each unit is a full apartment with a kitchen and bathroom, you should select the MULTIFAMILY HOUSING property use type.
  - o If your property houses students but is *not* affiliated with an educational institution, you should select the MULTIFAMILY HOUSING property use type.

- Military housing: Includes properties associated with a military facility that offer long-term accommodation for persons serving in or employed by the military:
  - o If your property includes common areas and either shared kitchens or no kitchens, you should select the BARRACKS property use type.
  - o If each unit is a full apartment with a kitchen and bathroom, you should select the MULTIFAMILY HOUSING property use type.
  - o If your property houses military personnel but is *not* affiliated with a military facility (off-base living), you should select the MULTIFAMILY HOUSING property use type.

- Detention facility*:* If your property is a federal, state, municipal, or private-sector building used for the detention of persons awaiting trial or convicted of crimes, you should select the PRISON/INCARCERATION property use type.

- Hotel/Lodging*:*
  - o If your property provides overnight accommodation on a room/suite and nightly basis, typically including bath/shower and other facilities in guest rooms, housekeeping/laundry and front desk/concierge services, you should select the HOTEL property use type.
  - o If your property is a vacation timeshare or a private residence that is rented out on a daily or weekly basis, you should select the MULTIFAMILY HOUSING property use type.

Secondary property use types

In general, Portfolio Manager recommends that you enter as few property use types as possible. Property use type definitions usually include secondary functions that are commonly associated with that property use type. The MULTIFAMILY HOUSING definition includes lobbies, offices, community rooms, common kitchens, fitness rooms, indoor pools, restaurants/cafés, retail space smaller than 5,000 square feet, hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space. Breaking out these uses separately does not increase the accuracy of your results. The floor area and use details of these auxiliary spaces should therefore be included within the floor area of the MULTIFAMILY HOUSING property use type, not entered as separate use types.

There are four exceptions to this rule where you should separate out a property type even when it is commonly associated with your primary type:

- If it is a property use type that can receive an ENERGY STAR score, such as Office, Hotel, Hospital, Data Center, K-12 School, Retail Store, Supermarket/Grocery Store, etc. (For a complete list of eligible property use types see: http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/identify-your-property-type-0);
- If it accounts for more than 25% of the property's gross floor area;
- If it is vacant/unoccupied space;
- If the weekly hours of operation differ by more than 10 hours from the main property use type.

Additionally, you should always separate out parking space and uses that are not commonly associated or auxiliary to your primary property use type (for example, a mixed-use building that has a daycare on the first floor and multifamily housing on higher floors).

2. Required Use Details for Multifamily Properties

The following guidelines cover required fields for the MULTIFAMILY HOUSING property use type. For details on required fields for other residential property use types, refer to Portfolio Manager guidance.

Number of living units, and living units in low/mid/high-rise buildings

The TOTAL NUMBER OF RESIDENTIAL LIVING UNITS is a count of all individual units or apartments, both occupied and vacant, each containing a separate, full kitchen and bathroom. Portfolio Manager also requires you to indicate the correct height category that applies to the building: LOW-RISE SETTING (1-4 STORIES), MID-RISE SETTING (5-9 STORIES), and HIGH-RISE SETTING (10 OR MORE STORIES). **Note that the units must be assigned to these categories based on the height of the building they are in, not based on which floor they are on.**

- If your property only has one building: you should enter the total number of units for the applicable height category for the building, and enter zero in the other two fields. For example: a 12-story building with 120 units would have 0 as the NUMBER OF RESIDENTIAL LIVING UNITS IN LOW-RISE BUILDING, 0 as the NUMBER OF RESIDENTIAL LIVING UNITS IN MID-RISE BUILDING, and 120 as the NUMBER OF RESIDENTIAL LIVING UNITS IN HIGH-RISE BUILDING.

- If your property has multiple buildings of the same height category: you should enter the total number of units for the applicable height category, and enter 0 in the other two fields.

- If your property includes buildings of different height categories that are benchmarking together: assign the units to the appropriate category based on the height of the building they are in. For example: a property with a 4-story building with 20 units and a 6-story building with 30 units would have 20 as the NUMBER OF RESIDENTIAL LIVING UNITS IN LOW-RISE BUILDING, 30 as the NUMBER OF RESIDENTIAL LIVING UNITS IN MID-RISE BUILDING, and 0 as the NUMBER OF RESIDENTIAL LIVING UNITS IN HIGH-RISE BUILDING.

- If your property has a single building with multiple portions/wings of different height categories: assign the units to the appropriate category based on the height of the portion/wing they are in. For example: a property with a 10-story tower with 40 units and a 3-story wing with 15 units would have 15 as the NUMBER OF RESIDENTIAL LIVING UNITS IN LOW-RISE BUILDING, 0 as the NUMBER OF RESIDENTIAL LIVING UNITS IN MID-RISE BUILDING, and 40 as the NUMBER OF RESIDENTIAL LIVING UNITS IN HIGH-RISE BUILDING.

Number of bedrooms

The NUMBER OF BEDROOMS should reflect the total number of bedrooms located in all individual residential units. You should find this information in your property's blueprint, rental/leasing documents or other building records. If there have been additions or modifications to the original units, adjust accordingly to reflect the current number of bedrooms.

Efficiency and studio apartments count as having 1 bedroom. A junior one bedroom (a unit with a separate space for sleeping, usually separated by a half wall or temporary wall) also counts as 1. Don't include in-unit common areas (for example living rooms) being used as bedrooms by tenants. For example: a property has 100 units broken out as follows: 20 are 4-bedrooms (20*4 = 80 bedrooms), 20 are 3-bedrooms (20*3 = 60 bedrooms), 20 are 2-bedrooms (20*2 = 40 bedrooms), 20 are 1-bedrooms (20*1 = 20 bedrooms), and 20 are studios (20*1 = 20 bedrooms). The total number of bedrooms would be: 80+60+40+20+20=220.

3. Optional Use Details for Multifamily Properties

The following guidelines cover optional fields for the MULTIFAMILY HOUSING property use type. For details on optional fields for other residential property use types, refer to Portfolio Manager guidance.

Resident population type

You can track what specific population resides at your property. The following options are available:

- No specific resident population: the property is not dedicated to any specific population;
- Dedicated student: privately owned, off-campus housing (not affiliated with a college or university) that is primarily occupied by undergraduate or graduate students;
- Dedicated military: off-base housing primarily occupied by persons serving in or employed by the military;
- Dedicated senior/independent living: housing that provides independent living to the elderly, including limited programs of assistance with domestic activities (meals, housekeeping, activities, transportation, etc.);
- Dedicated special accessibility needs: residents living in the property are covered by the American Disabilities Act;
- Other dedicated housing (please specify): another type of dedicated resident population.

Please note that these types of populations all fall under the MULTIFAMILY HOUSING property use type; in other cases, it is more appropriate to select a different property use type based on the resident population (SENIOR CARE COMMUNITY for nursing/assisted living; RESIDENCE HALL/DORMITORY for student housing affiliated with an educational institution; BARRACK for on-base military housing). Refer to the "Primary property use type" section above for more details.

Government subsidized housing

If your property receives some type of local, state, or federal affordable housing subsidy for some or all units, select YES. Examples include Federal Housing Association (FHA) Insured; Public Housing; Agricultural Housing; Veterans Affairs (VA) Housing; Department of Defense (DoD) Housing; Low Income Housing Tax Credit (LIHTC); Project Based Housing Assistance Payment (HAP) including Section 8, or another type of municipal, state or federal subsidy.

Number of laundry hookups

Portfolio Manager has two separate fields to track laundry hookups: NUMBER OF LAUNDRY HOOKUPS IN ALL UNITS and NUMBER OF LAUNDRY HOOKUPS IN COMMON AREA(S). In both cases, you should count all hookups that are available, even if the machine is inoperable or absent. Each machine should be counted as one hookup, regardless of the type (individual washer, individual dryer, or combination/stacked unit). The number of laundry hookups is an optional field and does not contribute directly to your property's ENERGY STAR score or other energy metrics, so if you don't have an exact count, enter your best estimate or leave it blank.

Percent that can be heated/cooled

Enter the total percentage (in 10% increments) that can be heated/cooled by mechanical equipment. This includes all types of heating/cooling, from central equipment to individual units.