Getting to 100%: Overcoming Barriers to Tenant Data Collection

Thursday, July 11
2:00 – 3:30pm
Speakers and Moderator

- **Speaker:** Caitlin Rood, Mercy Housing
- **Speaker:** Claire McLeish, WegoWise
- **Speaker:** Ilene Mason, Rethinking Power Management, LLC
- **Speaker:** Monica Watkins, Housing Authority of Baltimore City
- **Moderator:** Josh Geyer, U.S. Department of Housing & Urban Development
Mercy Housing At-a-Glance

- One of largest Affordable Housing Nonprofit in US
- Developer, owner, manager
- 329 owned properties
- ~23,700 units
- ~22.4M sf (owned)
- 21 States
- Mostly LIHTC, HUD (Section 202, Section 8), USDA RD
Getting to 100% Data

- Utilities Will Come Along
- Utility Accelerator
- Letter from Julian Castro
- Benchmarking Ordinances
- Advocate to your utility
- What about the rest of the country

**Individual Tenant Waivers**
- Collecting waivers
- Accuracy
- Availability
- Responsiveness
- Waivers
- Effort
Mercy Housing Data Collection History

Phase 1
ESPM – ESC (2013)

Phase 2
ESPM + Utility to ESC (2014)

Phase 3
100% Owner Paid Data (2015-2016)

Phase 4
Aggregated Tenant Data (2017–2018)

Phase 5
Direct Meter Level Data Collection (2019–2020)
Additional Aggregated Data Search

- Reach out to utilities to request aggregated tenant energy use data
Document Management System

- System to transfer, manage, and store photos and related files
- Pictures 2-3 MB each
- Dropbox – No for data privacy reasons
- Internal SharePoint
- One folder per property
- 70 properties
- >5,000 photos total
Property Data Request

- Request and instructions to each property manager
- Brief, specific, clear images
- Estimated 1-2 hours per property
- Include energy use and meter number in each picture
- Upload and notify
- Point of contact for questions
Review

- Energy use / Meter number
- Photo quality
  - Cut off use or number
  - Blurry
  - Unreadable
- # of pics do not match # of units
- Good pics but wrong display screen
  - Date, time, kW, peak kWh, off-peak kWh, total kWh
  - Research utilities meters
- Back and forth with property manager
<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Property</td>
<td>Meter ID</td>
<td>January 2019 kWh</td>
<td>January 2020 kWh</td>
<td>2019 use</td>
<td>Fuel</td>
</tr>
<tr>
<td>2</td>
<td>Hawthorne Village</td>
<td>48 047 695</td>
<td>28694</td>
<td></td>
<td></td>
<td>E</td>
</tr>
</tbody>
</table>

Data Entry
Looking Ahead

- Future Challenges
  - Zeroed out meter reads
    - New tenants
    - Meter upgrades
  - Rollover
  - Meters not tied to units
- Opportunities
Looking Ahead

- Future Challenges
  - Zeroed out meter reads
    - New tenants
    - Meter upgrades
  - Rollover
  - Meters not tied to units
- Opportunities
Caitlin Rood

National Sustainability Director
Mercy Housing
crood@mercyhousing.org
Claire McLeish

WegoWise
Claire McLeish
Customer Success Manager at WegoWise by Appfolio
Part 1: Beacon Communities Tenant Tracking Project

Part 2: The How-To’s of Tracking Tenants

- Keep Calm and Get Organized
- Signed, Sealed, Delivered
- What to Expect When You’re Expecting
Beacon Communities Tenant Tracking Project

Goal: Track 100% of tenant-paid utility data across the portfolio

Motivations:
- Utility allowance calculation
- Barriers to aggregate property data
- Commitment to portfolio-wide energy efficiency

Scope:
- Tenant consent rollout in January 2019
- 49 properties with 6,500 tenants
- 9 electric and gas utility companies
- Mixed low-income & market-rate
Beacon Communities Tenant Tracking Project

Success Rate: Signed consent from 2,958 of 6,523 units

Property-level signatory rate:
- Range: 7-91%
- Median: 45%
- Mean: 49%

Ten properties achieved a >70% signatory rate

Portfolio-wide signatory rate: 45%

Ongoing monthly data collection with WegoWise and yearly data requests
Building A Successful Tenant Tracking Program In-House
Screen the utility company

- Leverage the HUD Multifamily Utility Data Collection resource
- Property manager: 20 minute phone call
- Generic release form? What is process? Turnaround time? What data is available?

Make it easy

- Expect partially completed forms—list important fields first
- Ask for a release and bill copy

Explain the purpose

- Section 8: Mandatory (24 CFR 5.659 and the HUD Model Lease for Subsidized Projects)
- Bilingual cover letter
Signed, Sealed, Delivered: Getting Tenants to Sign

Start Day 1
- Build the utility release into a move-in packet
- Utility service transfer in-office
- Avoid utility theft

Canvass strategically
- In-person: elderly and multilingual communities
- Build allies and educate the “rabble rouser”
- Designate 1-2 week timeframe
- Target tenants with tenancy >10 months

Expect pushback and mixed success
- 20-60% signatory rate
What to Expect When You’re Expecting: Obtain Data

Obtain data online where possible
- ComEd, Eversource, Dominion Virginia, Columbia Gas, etc.

Push back on hurdles
- Send data to centralized location
- Push back on mail/physical pickup
- Send in Excel
- Be persistent

Be specific with the request
- Monthly, account-level data
- 13 months

Request data in late January for BBC!
Thank You
Questions?

Claire McLeish
Customer Success Manager WegoWise by Appfolio
claire.mcleish@appfolio.com
Ilene Mason
Rethinking Power Management, LLC
Getting to 100% Data: Using the BBC Tenant Data Sampling Plan
Rethinking Power Management (RPM) helps clients run their facilities in a more sustainable manner, focusing on reductions in energy and water use and improved occupant comfort.

We have used the BBC Tenant Sampling Plan to report whole building use for the Schochet Companies affordable housing portfolio since 2016 (approx. 24 sites, 4100 units).
BBC Tenant Sampling Guidelines
Tenant Sampling Guidelines

An alternate pathway to meet BBC reporting requirements when whole building data is not available.

- Low sampling requirement is not a burden on property resources.
- Provides a small measure of insight into tenant usage.
- Information and assistance are readily available (Energy Data Tracking Manual for Better Buildings Challenge Partners Appendix C).

<table>
<thead>
<tr>
<th>TOTAL UNITS</th>
<th>SAMPLE (minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-9</td>
<td>2</td>
</tr>
<tr>
<td>10-19</td>
<td>3</td>
</tr>
<tr>
<td>20-29</td>
<td>4</td>
</tr>
<tr>
<td>30-49</td>
<td>5</td>
</tr>
<tr>
<td>50-74</td>
<td>6</td>
</tr>
<tr>
<td>75-99</td>
<td>7</td>
</tr>
<tr>
<td>100-149</td>
<td>8</td>
</tr>
<tr>
<td>150-200</td>
<td>9</td>
</tr>
<tr>
<td>&gt;200</td>
<td>10</td>
</tr>
</tbody>
</table>
Tenant Sampling Guidelines

Samples must represent:

- All tenant paid utilities.
- All unit styles (townhouse, garden style).
- The number of bedrooms within each style.

**FIGURE C-2: EXAMPLE SAMPLE SIZE CALCULATION**

<table>
<thead>
<tr>
<th></th>
<th>WHOLE PROPERTY</th>
<th>1-BEDROOM</th>
<th>2-BEDROOM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Units</strong></td>
<td>200</td>
<td>150</td>
<td>50</td>
</tr>
<tr>
<td><strong>Recommended Sample Size</strong></td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td><strong>Proportion of Total</strong></td>
<td></td>
<td>0.75</td>
<td>0.25</td>
</tr>
<tr>
<td><strong>Recommended Sample Size (Rounding Up)</strong></td>
<td>8</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
Sample tenant data is:

- Averaged for each unit type is extrapolated for the site.
- Type averages summed and combined with owner-paid usage to get “whole” building data.
Process and Helpful Tips
Process

1. Select tenants based on the BBC Guidelines.
2. Solicit tenant authorization forms.
3. Request and confirm utility data.
4. Compile and upload data.
Select tenants (if existing)

- Tenant occupancy profiles vary
- Select at least double the required sample size
- Seek property manager input

Solicit tenant authorization forms

- Require valid account number
- If possible, arrange signing 2-3 days before move-in
- Provide language translations and/or interpreter
Request and confirm utility data
- Process can vary from a couple of days to a couple of months
- Establish a relationship with the appropriate utility contact
- Persistence is key
- Quality check the data received

Compile and upload data
- Excel spreadsheets work well for compiling data
- Create Portfolio Manager meters to facilitate future error checking and other data uses
Potential Uses of Sample Data

- High-level check against industry benchmarks
- Value of expanding sample size or pursuing 100% tenant data
- Use caution when making assumptions
  - Small sample size
  - We found significant variation between extrapolated sample and whole building data
THANK YOU

Ilene Mason
Rethinking Power Management, LLC
imason@rpmpowerllc.com
508-259-5030
Getting to 100%: Overcoming Barriers to Tenant Data Collection

Presentation by: Monica Watkins
Housing Authority of Baltimore City - Who We Are

- Established in 1937 to provide federally-funded public housing programs and related services for Baltimore's low-income residents
- HABC is in the top 10 largest housing authorities in the country
- Over 700 employees
- Annual operating budget ~$340 MM
Housing Authority of Baltimore City - Who We Serve

HABC - Who We Are

- 7,631 Public Housing Units
- 1 Mixed Population Buildings
- 12 Family Developments
- Over 1201 Scattered Sites
- 13,213 Section 8 Units
- Wait list for housing: 40,000
Housing Authority of Baltimore City—What We Spend

Agency-wide Utilities Cost - FY-18

- Water: $8,487,387
- Gas: 3,007,716
- Steam: 3,325,623
- Electricity: 5,780,886
- Total: 20,601,612
HABC-Eye on Energy Program

HABC has implemented energy conservation measures and practices to accomplish the following:

- Reduce energy consumption
- Reduce energy & utility costs (approximately $3 million per year from baseline in 2010)
- Help residents live in comfortable and energy efficient units
Housing Authority of Baltimore City Eye on Energy Program

Focus on Utility & Energy Conservation
<table>
<thead>
<tr>
<th>Number of Bed Rooms</th>
<th>kWh Per Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Bed Room</td>
<td>182 kWh per month</td>
</tr>
<tr>
<td>Two Bed Rooms</td>
<td>236 kWh per month</td>
</tr>
<tr>
<td>Three Bed Rooms</td>
<td>295 kWh per month</td>
</tr>
</tbody>
</table>
What’s **Included**: Utility Allowance Major Electric Appliances

<table>
<thead>
<tr>
<th>List of Major Appliances Included in Utility Allowances</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interior Lighting</strong></td>
</tr>
<tr>
<td>Incidental Exterior Lighting</td>
</tr>
<tr>
<td><strong>Combination Refrigerator with Freezer</strong></td>
</tr>
<tr>
<td>Electric Range/Oven</td>
</tr>
<tr>
<td><strong>Domestic Water heater</strong></td>
</tr>
<tr>
<td>Furnace Fan</td>
</tr>
<tr>
<td><strong>Television</strong></td>
</tr>
<tr>
<td>Computer</td>
</tr>
</tbody>
</table>
| **Space Heating Systems** (permanently installed systems such as heat Pumps, baseboard heat and electric furnaces)** | Miscellaneous small appliances (stereo, radio, clock, cell phone charger, kitchen appliances, bathroom appliances, toys, games electric tools, portable fans, coffee makers, etc.)

**24 CFR 965.505 (a) HUD Mandated Requirement for Developing Utility Allowances:**
Allowances must be consistent with an “energy-conservative household of modest means”
### What’s Not Included:
Utility Allowance Major Electric Appliances

<table>
<thead>
<tr>
<th>List of Major Appliances NOT Included in Utility Allowances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra Freezer</td>
</tr>
<tr>
<td>Clothes Dryer</td>
</tr>
<tr>
<td>Swimming Pool/Hot Tub/Jacuzzi Heater</td>
</tr>
<tr>
<td>Aquarium Heaters</td>
</tr>
<tr>
<td>Space cooling (i.e. Air conditioning) - Central Systems</td>
</tr>
<tr>
<td>Portable Space Heaters</td>
</tr>
<tr>
<td>Dehumidifier</td>
</tr>
</tbody>
</table>

24 CFR 965.505 (b) HUD Mandated Requirement for Developing Utility Allowances:
(b) Allowances for both PHA-furnished and resident-purchased utilities shall be designed to include such reasonable consumption for major equipment or for utility functions furnished by the PHA for all residents (e.g., heating furnace, hot water heater), for essential equipment whether or not furnished by the PHA (e.g., range and refrigerator), and for minor items of equipment (such as toasters and radios) furnished by residents.
## Comparing Use By Room Size & Behavior

<table>
<thead>
<tr>
<th>Ref. #</th>
<th>Tenant ID</th>
<th>Address</th>
<th>BR #</th>
<th>Allotment</th>
<th>Use Nov- 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>FM100</td>
<td>XXX4 ANNOR CT</td>
<td>1</td>
<td>182</td>
<td>130</td>
</tr>
<tr>
<td>4</td>
<td>FM100</td>
<td>XXX2 WILGREY CT</td>
<td>1</td>
<td>182</td>
<td>131</td>
</tr>
<tr>
<td>23</td>
<td>FM100</td>
<td>XXX3 ANNOR CT</td>
<td>1</td>
<td>182</td>
<td>374</td>
</tr>
<tr>
<td>24</td>
<td>FM100</td>
<td>XXX0 WILGREY CT</td>
<td>1</td>
<td>182</td>
<td>508</td>
</tr>
<tr>
<td>6</td>
<td>FM100</td>
<td>XXX9 MAISEL CT</td>
<td>2</td>
<td>236</td>
<td>97</td>
</tr>
<tr>
<td>7</td>
<td>FM100</td>
<td>XXX9 WILGREY CT</td>
<td>2</td>
<td>236</td>
<td>108</td>
</tr>
<tr>
<td>124</td>
<td>FM100</td>
<td>XXX7 MAISEL CT</td>
<td>2</td>
<td>236</td>
<td>711</td>
</tr>
<tr>
<td>125</td>
<td>FM100</td>
<td>XXX2 MAISEL CT</td>
<td>2</td>
<td>236</td>
<td>954</td>
</tr>
<tr>
<td>4</td>
<td>FM100</td>
<td>XXX6 WILGREY CT</td>
<td>3</td>
<td>295</td>
<td>123</td>
</tr>
<tr>
<td>5</td>
<td>FM100</td>
<td>XXX1 DUMFRIES C</td>
<td>3</td>
<td>295</td>
<td>175</td>
</tr>
<tr>
<td>50</td>
<td>FM100</td>
<td>XXX8 MAISEL CT</td>
<td>3</td>
<td>295</td>
<td>837</td>
</tr>
<tr>
<td>51</td>
<td>FM100</td>
<td>XXX7 KERMIT CT</td>
<td>3</td>
<td>295</td>
<td>847</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>62,311</strong></td>
<td></td>
</tr>
</tbody>
</table>
Housing Authority of Baltimore City Eye on Energy Program

Residents can access their own data online and via kiosk

Resident Energy Management & Education: Tools

Office of Resident Services

The mission of Baltimore Housing’s Office of Resident Services is to enhance the quality of life for public housing and Housing Choice Voucher Program residents of Baltimore City. To accomplish its goals, the Office of Resident Services coordinates and implements a vast array of programs and services to include: job search assistance and placement, social and health services, literacy education, job training, youth activities and assistance to resident organizations.

Relevant Links

Interested in the Special Mobility Housing Choice Voucher Program?
The SMBVP is a program assists current residents and others to find affordable rental housing in non-impacted areas of Baltimore City and surrounding counties.

skip navigation links | Accessibility
Looking for something? We can help:
Search by keyword
Email our office.

Home
Resident Services
Residents can access their own data online and via kiosk
Residents can access their own data online and via kiosk.

Housing Authority of Baltimore City Eye on Energy Program

RESIDENT ALLOTMENT AND USAGE DETAILS

Resident: HANA Larsah A
Address: 200 N FREMONT AV APT 07
Unit: 0033

Project No / Name: 0004 / POE HOMES
Area: FM1
Moved In Date: 02 Nov 2009

This page shows your monthly allotments for Electricity, Water and Gas. Usage details for the last completed month are shown below.

The current consumption is computed based on prorated calculation. The allotment value will most likely not match identically with your property agreement due to the multiple month span.

Use the (Previous - Next) buttons to navigate to details for other months.

March 2010

ALLOTMENT AND USAGE FOR THE MONTH OF MARCH 2010

There is no bill in the system under your account for the selected month.

The Last Bill available in the system for your account is for the month of January 2010.

<table>
<thead>
<tr>
<th>UTILITY</th>
<th>ALLOTMENT</th>
<th>USAGE</th>
<th>CURRENT USAGE (SMART METERS ONLY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ELECTRICITY</td>
<td>N/A</td>
<td>N/A</td>
<td>Feb 10 - Mar 10</td>
</tr>
<tr>
<td>WATER</td>
<td>N/A</td>
<td>N/A</td>
<td>99 of 0 KWH allotment used.</td>
</tr>
<tr>
<td>GAS</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
## Housing Authority of Baltimore City Eye on Energy Program

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utility Bill and consumption history review with residents</td>
<td>Monthly review of excessive consumption</td>
</tr>
<tr>
<td>Monthly phone calls to residents</td>
<td>Energy Office Team member attempts to contact the residents whose energy usage exceeds the utility allowance by $40 and over per month</td>
</tr>
<tr>
<td>Energy and Utility Usage Surveys</td>
<td>Residents are contacted by Energy team for survey of utility usage</td>
</tr>
<tr>
<td>Community meetings</td>
<td>Ongoing Residents Community Meetings, presentations and demonstrations are periodically provided</td>
</tr>
<tr>
<td>Energy Mailings</td>
<td>Energy conservation tips and billing letters and notices are mailed to the residents' homes</td>
</tr>
<tr>
<td>Energy Email</td>
<td><a href="mailto:Energy_hotline@habc.org">Energy_hotline@habc.org</a></td>
</tr>
<tr>
<td>Energy Hotline</td>
<td>410-396-1128</td>
</tr>
</tbody>
</table>
Electricity Pre-Billing Notification

Sample Pre-Billing Notice
# Electricity Billing Statement

**American Conservation Billing Solutions**

**Address:** 4127 Faye Street, Suite 411
**Phone:** 410-676-1811
**Website:** www.AmConBill.com

---

**Cherry Hill Homes (HABC)**
**Unit:** FM 10013-00 A X
**Entity ID:** 0009120A X X X
**Account Number:** 10490QX-003

---

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Balance:</td>
<td>$41.37</td>
</tr>
<tr>
<td>Payments</td>
<td>-$9.60</td>
</tr>
<tr>
<td>Total Past Due Balance</td>
<td>-$4.37</td>
</tr>
<tr>
<td>Current Charges</td>
<td>$73.03</td>
</tr>
<tr>
<td>Date of Last Payment</td>
<td></td>
</tr>
</tbody>
</table>

---

**Meters**

<table>
<thead>
<tr>
<th>Meter Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric</td>
<td></td>
</tr>
</tbody>
</table>

**Readings**

<table>
<thead>
<tr>
<th>Date</th>
<th>KWH</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/30/2018</td>
<td>74051</td>
</tr>
<tr>
<td>09/30/2018</td>
<td>77655</td>
</tr>
</tbody>
</table>

---

**Billing Period**

- **Start Date:** 08/31/2018
- **End Date:** 09/30/2018
- **Duration:** 30 Days

---

**Multiple Payment Options**

- Pay Online at www.AmConBill.com
- Pay by Phone at 1-877-410-0187 x a
- Pay in Person at a Payment Center w/Bar Code - Go online/call for locations.
- Pay by E-Check or Telet by referring to received message.

---

**For Billing Questions**

- **Contact:** ClientCare@AmConBill.com
- **Phone:** 1-877-410-0187

---

**PayNearMe**

- Bring the roll number with you to make a cash payment. Call PayNearMe Support at (888) 714-0844 for cash payment help. Visit www.PayNearMe.com for participating retail locations.

---

**Load Like a Gift Card**

- **Gift Card Number:** PSF222

---

**Payment Without a Gift Card**

- **Gift Card Number:** PSF222
Thank You
Thank You

Provide feedback on this session in the Summit App!

Download the app to your mobile device or go to event.crowdcompass.com/bbsummit19