



PENNSYLVANIA GREEN ENERGY LOAN FUND

GELF Procedures Manual for Measurement and Verification Energy and Water Utility Release Forms

Introduction

The capital sources for GELF require that we track energy usage before and after the energy project. This manual will explain how that is done.

Attached to this document are multiple release forms for different forms of energy (electricity, natural gas, heating oil, steam and propane) and for water. [Note that the forms are available in Microsoft Word® format on the GELF website.] Reinvestment Fund and their consulting engineer, Practical Energy Solutions, will use your signed releases to obtain consumption and billing data from the energy companies and the water company that is serving your building. We need to report this data to the Pennsylvania Department of Environmental Protection and the U.S. Department of Energy. We will not publicly share your data in any other way without your explicit consent. If you have any concerns about this, please contact PaGELF@reinvestment.com.

Please note that the terms of your energy loan will not be changed in any way based on your actual energy consumption data. If your project does not achieve the energy savings that your energy audit or energy modeling predicted, GELF will not come after you in any way. The collection of data is for the purpose of verifying the effectiveness of the various analytical tools that were used to estimate energy savings. The Department of Energy rightly realized that the large number of energy projects across the country being supported by their dollars was a rich data set of building energy information that should not be ignored. Again, you do not need to worry about this data being used to penalize you in any way.

Energy and Water Utility Release Forms

GELF borrowers must fill out the appropriate form for each of the different types of utility accounts at their building. Everyone will have electricity, most will have natural gas, a few will have heating oil, steam or propane, and everyone will have water. If you use a different fuel (maybe coal or wood chips), please contact Reinvestment Fund for the appropriate form.

To fill out the forms, begin by having the most current bill from each utility provider in front of you. The bill will contain all of the information you need to complete the forms.

Please type in your information for each account on the appropriate page and then print it out on your letterhead. Or you can print out the forms on your letterhead and then fill them in by hand. The forms have room at the top and bottom of the page so they fit on most letterhead, but if you have unusual letterhead, you may need to adjust the margins a bit. If you are having problems getting the forms to fit on your letterhead, please contact us directly. It is very important that the signed forms are on your letterhead so it is obvious the release comes from your organization.

The information needed to complete the top portion of the form includes Company Name, Customer Name, Customer Account Number, Customer Meter Number (or for heating oil and propane customers, the Tank Number) and Customer Address. It is important that you list this information exactly as it is shown on your bill so the company gives us the correct information. If the information does not match your bill, the utility may reject the form.

The next boxes are for the start date and the end date of when you authorize GELF to obtain this information. To determine the proper dates, begin with the expected completion date of your energy project. The Start Date for the release should be two years earlier than this expected completion date and the End Date of the release should be two years later than the expected completion date.

GELF understands that not all projects will have two years of meaningful data prior to the completion of the energy project, but the energy data during the construction period of the project is useful information, so the two years prior rule makes sense for all projects.

The final set of boxes simply asks for your name (printed if you are completing the forms by hand), title and the date.

Energy Usage by Tenants

GELF needs to evaluate all energy being consumed in your building, so if your building has tenants who have their own separate utility accounts, GELF will need releases for those accounts as well as for the common areas in the building. Some utilities are beginning to provide anonymous, aggregated building usage data by address, but tenant releases are most likely going to be necessary in the near term.

GELF strongly recommends that the leases in the property include a clause that requires tenants to authorize the release of their energy data. This saves the time needed to make individual requests.

Please contact Reinvestment Fund staff if you have tenants in your buildings to discuss how their energy data will be collected.

ENERGY STAR's Portfolio Manager

The energy consumption data for GELF's projects will be reported using ENERGY STAR's *Portfolio Manager*, a free, web-based benchmarking program operated by the Environmental Protection Agency. Practical Energy Solutions (<https://practicalenergy.net/>), GELF's Technical Reviewer, is available to help all GELF borrowers set up their Portfolio Manager accounts and to master the process for entering ongoing energy consumption data.

Setting up a Portfolio Manager account is not difficult. The data that needs to be entered includes building location, building size, percentage of building heated and cooled and property type. Portfolio Manager has 18 broad categories of property types, with more than 80 sub-categories. Depending on the property type, Portfolio Manager asks for some additional information about the property. For example, for office buildings, the other data needed is the number of workers, hours of operation per week and the number of personal computers. GELF Borrowers must provide Reinvestment Fund and the Pennsylvania Department of Environmental Protection permission to access the Portfolio Manager account for the building. But again, GELF will help you set up your Portfolio Manager account.



Once the Portfolio Manager account is set up, the monthly energy bills are entered. Some electric utilities now automatically send usage data to Portfolio Manager, making the process even easier.

www.energystar.gov/benchmark

The true value of Portfolio Manager is that it benchmarks your energy usage, giving your building a ENERGY STAR score between 1 and 100. The score compares your building's energy usage with similar type buildings across the country, adjusting for climate and weather. A score of 50 represents median energy performance – half of the buildings in your group use less energy than you do and half use more.. A score of 75 means your building uses less energy than 75% of the buildings in your group and you may be eligible for ENERGY STAR certification. Portfolio Manager also lets you track your performance from year to year so you can see if your usage is improving.

Portfolio Manager is available at www.energystar.gov/benchmark. A two-page quick-start guide is available at www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide. The ENERGY STAR tools and resources link for a robust set of Portfolio Manager reports and factsheets is at [www.energystar.gov/buildings/tools-and-resources?f\[0\]=field_select_primary_category%3A685](http://www.energystar.gov/buildings/tools-and-resources?f[0]=field_select_primary_category%3A685). Training videos on different Portfolio Manager issues are available at <http://essearch.energystar.gov/search/news/videos?affiliate=www.energystar.gov&query=Portfolio+manager>.

Questions or Difficulties

If you have any questions about our use of the data, or cannot find the information we are requesting or are having problems printing the forms on your letterhead, please contact us directly at PaGELF@reinvestment.com.

Authorization to Release Electricity Usage Data

To: Name of Electric Company:

From:

Customer Name:

Customer Account Number:

Customer Meter Number:

Street Address 1:

Street Address 2:

City:

State: Zip:

I, the undersigned, hereby authorize you to release information about the electricity consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our energy usage before and after our energy project.

Start Date of Authorized Release:

End Date of Authorized Release:

I certify that I have authority to authorize this release of information on behalf of my organization.

(signature)

Name:

Title:

Date:

Authorization to Release Natural Gas Usage Data

To: Name of Gas Company:

From: Customer Name:

Customer Account Number:

Customer Meter Number:

Street Address 1:

Street Address 2:

City:

State: Zip:

I, the undersigned, hereby authorize you to release information about the natural gas consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our energy usage before and after our energy project.

Start Date of Authorized Release:

End Date of Authorized Release:

I certify that I have authority to authorize this release of information on behalf of my organization.

(signature)

Name:

Title:

Date:

Authorization to Release Heating Oil Usage Data

To: Name of Oil Company:

From: Customer Name:

Customer Account Number:

Customer Meter Number:

Street Address 1:

Street Address 2:

City:

State: Zip:

I, the undersigned, hereby authorize you to release information about the heating oil consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our energy usage before and after our energy project.

Start Date of Authorized Release:

End Date of Authorized Release:

I certify that I have authority to authorize this release of information on behalf of my organization.

(signature)

Name:

Title:

Date:

Authorization to Release Steam Usage Data

To: Name of Steam Company:

From:

Customer Name:	<input style="width: 100%;" type="text"/>
Customer Account Number:	<input style="width: 100%;" type="text"/>
Customer Meter Number:	<input style="width: 100%;" type="text"/>
Street Address 1:	<input style="width: 100%;" type="text"/>
Street Address 2:	<input style="width: 100%;" type="text"/>
City:	<input style="width: 100%;" type="text"/>
State: <input style="width: 100px;" type="text"/>	Zip: <input style="width: 100px;" type="text"/>

I, the undersigned, hereby authorize you to release information about the steam consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our energy usage before and after our energy project.

Start Date of Authorized Release:	<input style="width: 100%;" type="text"/>
End Date of Authorized Release:	<input style="width: 100%;" type="text"/>

I certify that I have authority to authorize this release of information on behalf of my organization.

(signature)

Name:	<input style="width: 100%;" type="text"/>
Title:	<input style="width: 100%;" type="text"/>
Date:	<input style="width: 100%;" type="text"/>

Authorization to Release Propane Usage Data

To: Name of Propane Company:

From: Customer Name:
 Customer Account Number:
 Customer Meter Number:

Street Address 1:
 Street Address 2:
 City:
 State: Zip:

I, the undersigned, hereby authorize you to release information about the propane consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our energy usage before and after our energy project.

Start Date of Authorized Release:
 End Date of Authorized Release:

I certify that I have authority to authorize this release of information on behalf of my organization.

 (signature)

Name:
 Title:
 Date:

Authorization to Release Water Usage Data

To: Name of Water Company:

From: Customer Name:

Customer Account Number:

Customer Meter Number:

Street Address 1:

Street Address 2:

City:

State: Zip:

I, the undersigned, hereby authorize you to release information about the water consumption and costs of the account listed above to Reinvestment Fund and to Practical Energy Solutions LLC for the purpose of tracking our water usage before and after our energy project.

Start Date of Authorized Release:

End Date of Authorized Release:

I certify that I have authority to authorize this release of information on behalf of my organization.

(signature)

Name:

Title:

Date: