



Beyond Benchmarking 401: Forms Submissions

City of San José Energy and Water Building Performance Ordinance (BPO)
March 2023



Environmental Services



Delivering world-class utility services and programs
to improve our health, environment, and economy.



7 Beyond Benchmarking Steps to Compliance



Step 1: Determine Your Building's Beyond Benchmarking Compliance Deadline



Step 2: Determine Whether Your Building Qualifies for a Beyond Benchmarking Exemption



Step 3: Verify You Have Submitted Benchmarking Data for the Previous Three Years



Step 4: Determine Your Pathway: Performance or Improvement



Step 5: Find a Qualified Service Provider



Step 6: Complete Your Pathways



Step 7: Submit Your Forms



Submitting Your Compliance Forms: *General Information*

- Reports will be accepted starting in March of building's deadline year – two months before your compliance deadline
- A successful submission will generate an email confirmation
- The City will report the results of its review by email
- Maintain all Beyond Benchmarking records for a minimum of five years, and/or transfer these records to the new owner if the building is sold
- All forms are located on the [Beyond Benchmarking webpage](#)



Performance Pathway Form

- Fill out the form and include all necessary attachments:
 - Performance Verification Report (in the form of Energy Star's Data Verification Checklist)
 - Current LEED Existing Buildings Operations and Maintenance v4 Certification (for applicable buildings)
 - Temporary Certificate of Occupancy or Certificate of Occupancy (for new buildings only)



LEARN MORE AT
energystar.gov

ENERGY STAR® Data Verification Checklist

86

ENERGY STAR®
Score¹

Sample Property

Primary Function: Office
Gross Floor Area (ft²): 200,000
Built: 1980

For Year Ending: 04/30/2013
Date Generated: 06/28/2013

1. The ENERGY STAR score is a 1-to-100 assessment of a building's energy efficiency as compared with similar building nationwide, adjusting for climate and business activity.

Property & Contact Information

Property Address

Sample Property
123 Main Street
Arlington, Virginia 22030

Property Owner

Wellington Commercial Property
Managers
1 Washington Blvd
Arlington, VA 22030
() - -

Primary Contact

Jane Smith
1 Washington Blvd
Arlington, VA 22030
() - -
jsmith@wcbp.com

Property ID: 5000023

1. Review of Whole Property Characteristics

Basic Property Information

- 1) **Property Name:** Sample Property Yes No
Is this the official name of the property?
If "No", please specify: _____
- 2) **Primary Function:** Office Yes No
Is this an accurate description of the primary use of this property?
- 3) **Location:** Yes No
123 Main Street
Arlington, Virginia 22030
Is this correct and complete?
- 4) **Gross Floor Area:** 200,000 ft² Yes No

Notes:

4. Signature & Stamp of Verifying Licensed Professional

_____ (Name) visited this site on _____ (Date). Based on the conditions observed at the time of the visit to this property, I verify that the information contained within this application is accurate and in accordance with the Licensed Professional Guide.

Signature: _____ Date: _____

Licensed Professional
License: 1245 in VA

Donald Brown
1 Washington Blvd
Arlington, VA 22030
202-333-4444
donaldbrown@wcbp.com

NOTE: When applying for the ENERGY STAR, the signature of the Verifying Professional must match the stamp.

Professional Engineer Stamp
(if applicable)

Example ENERGY STAR Data Verification Checklist

Delivering world-class utility services and programs to improve our health, environment, and economy.



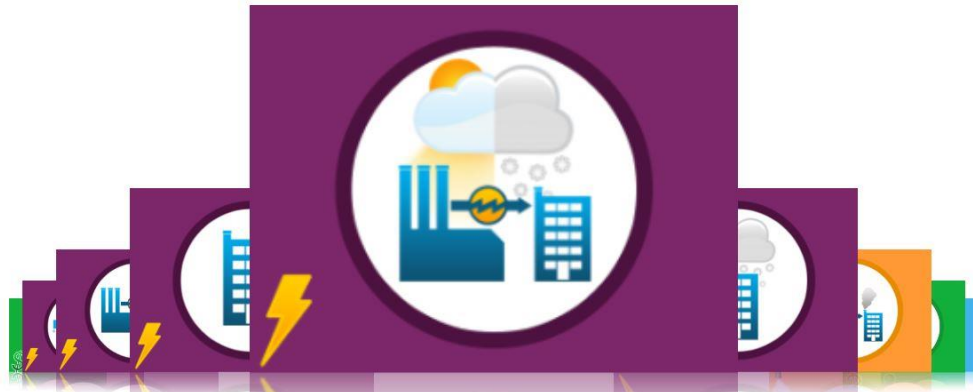
MyPortfolio

Sharing

Reporting

Recognition

Charts & Graphs



Weather Normalized Source EUI

How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SED\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Data Requests from Others

My Reports and Templates

ENERGY STAR Reports

Create a New Template

Snapshot of ENERGY STAR reporting tab



Improvement Pathway Form

Fill out the form and include all necessary attachments:

- Level II Audit , Retrocommissioning, or Efficiency Improvement Measure report
- *Only if applicable.* Documentation for building status “Pending - Project Underway”: submit documentation showing that the project has been permitted and/or contracted

- The date(s) that the audit was performed
- Identifying information of auditor
- Information on the Base Building Systems and equipment
- List of Retrofit Measures that reduce energy/water use, capital improvements
- Functional performance testing reports
- Operational training conducted
- Proof an ASHRAE Level Two (2), or alternate approved audit was conducted
- Identifying existing EV infrastructure including:
 - Number of existing electrical charging station and EV Capable parking spaces
 - Or number of 40-amp minimum circuit capacity near existing parking spaces

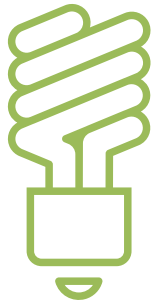
Audit Report Minimum Requirements





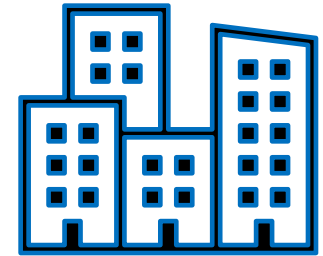
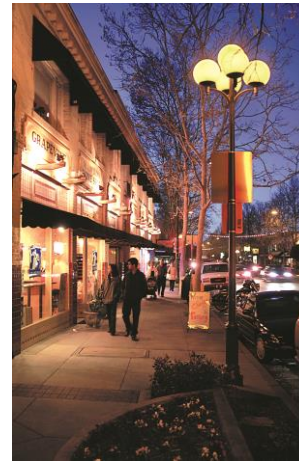
Retrocommissioning (RCx) Report Minimum Requirements

- The date(s) that the RCx was performed
- Identifying information for the RCx provider
- Information on Base Building Systems and equipment both before and after the RCx
- All the RCx process activities undertaken, and RCx Measures completed



Efficiency Improvement Measures Report Minimum Requirements

- Descriptions of the measures including the date(s) that they were implemented
- Information of provider implementing the measures
- Information on Base Building Systems and equipment
- List of measures that reduce energy/water use and capital improvements



Beyond Benchmarking Resources

- Our Beyond Benchmarking webpage is where all the helpful resources live
 - Compliance Guide, FAQs, Compliance Schedule, submittal forms, webinar recordings, etc.

www.SJEnvironment.org/Beyond-Benchmarking

- For questions
 - Email: benchmarking@sanjoseca.gov

www.SJEnvironment.org/Benchmarking

Thank you for joining us!

Any Questions?



Delivering world-class utility services and programs to improve our health, environment, and economy.

Environmental Services