

BENCHMARKING CHECKLIST

Tasks that need to be completed by each State Agency



Assign Agency, Departmental and Facility Managers to oversee and complete benchmarking – report names and contact info to the Benchmarking Work Group



Review Facility list to ensure it is complete and accurate.



Add utility Account, Service, and Meter IDs to the Facility list where indicated.



For buildings served by utilities participating in automatic data uploads, provide completed utility data release authorizations to the Benchmarking Work Group



For facilities served by non-participating utilities, obtain historical energy usage data (from the utility), beginning January 2003, and upload this data into Portfolio Manager



Designate someone who will participate in a train-the-trainer program and become a technical resource on benchmarking for your agency/departments

DETAILED BENCHMARKING CHECKLIST

1. Assign Agency, Departmental, and Facility Managers with the functional responsibility to complete benchmarking on time.
 - a. Provide the contact information of that person, as well as that of an alternate, to the Benchmarking Contacts listed below
2. Review the facility/account list for your Agency/Department to assure that it is complete and accurate and make adjustments as necessary.
 - a. Add, remove and change structures as necessary – fix corresponding information.
 - b. Add facilities you lease from another department where you pay the utility bills.
3. Review required utility and account information for accuracy and completeness.
4. For Participating Utilities Only - For [utilities participating in the automated data transfer program](#), ensure all applicable meters are being updated at least every 3 months. For new meters, obtain and complete a [utility data release authorization](#) for each utility. All the participating utilities accept the same form. It has been reviewed and approved by the DGS Office of Legal Services.
5. For Non-Participating Utilities Only – [Contact your utility](#) and [request](#) that they provide historical energy usage and cost data back to January 2003 (baseline period). Refer the utility to the website for [data formatting instructions](#).
6. Adding Energy Information Manually - After the PM account is created
 - a. Upload the information provided by your non-participating utility using the [Multi Facility Meter Update process](#), or
 - b. Using the PM interface, enter energy usage data manually from copies of bills, or
 - c. Create properly formatted files from you existing computer data files and upload them into Portfolio Manager using the Multi Facility Meter Update process.
 - d. At least quarterly, update PM with current billings.
7. Designate a Trainer who will participate in a Train-The-Trainer program. This person will be the subject matter expert for the Portfolio Manager application and for trouble shooting XML data transfers. This person should field all questions within your organization.
8. Update facility information in Portfolio Manager. Only rudimentary information was used to establish your account. As the PM Rating is dependent on square footage, number of occupants, hours of use, number of personal computers and other factors, this information should be added at the earliest opportunity.
9. Department benchmarking managers should share their portfolios with their Agency and with the State Master Account (see below).

MASTER ACCOUNTS

Master Accounts provide for the aggregation of data, facilitating Agency and Statewide reporting within Portfolio Manager. Department and Agency portfolios must be shared as described below.

First, share your Department portfolio with your Agency listed below. If your Agency is not listed, call the Benchmarking Work Group contact.

Agency Level Share

CALIFORNIA BUSINESS, TRANSPORTATION AND HOUSING AGENCY – CALIFORNIABTH
CALIFORNIA DEPARTMENT OF CONSERVATION – CALIFORNIACON
CALIFORNIA DEPARTMENT OF CORRECTIONS AND REHABILITATION – CALIFORNIACDCR
CALIFORNIA DEPARTMENT OF EDUCATION – CALIFORNIACDE
CALIFORNIA DEPARTMENT OF FOOD AND AGRICULTURE – CALIFORNIADFA
CALIFORNIA DEPARTMENT OF JUSTICE – CALIFORNIADOJ
CALIFORNIA DEPARTMENT OF VETERANS AFFAIRS – CALIFORNIA DVA
CALIFORNIA DEPARTMENT OF HEALTH AND HUMAN SERVICES AGENCY - CALIFORNIAHHS
CALIFORNIA LABOR AND WORKFORCE DEVELOPMENT AGENCY – CALIFORNIALWD
CALIFORNIA MILITARY DEPARTMENT – CALIFORNIAMIL
CALIFORNIA RESOURCES AGENCY - CALIFORNIARA
CALIFORNIA RESOURCES AGENCY – CALIFORNIARA
CALIFORNIA STATE AND CONSUMER SERVICES AGENCY - CALIFORNAISCS
CALIFORNIA STATE LANDS COMMISSION – CALIFORNIASLC

Second, share your Agency portfolio with the State level account.

State Level Share

California State Master Account - CALIFORNIASTATE

BENCHMARKING CONTACTS

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