



Benchmarking Data Consultant Requirements

Under 2019 guidelines for Green Up® and Green Up Plus® loans, Borrowers must now retain a qualified third-party consultant (Benchmarking Data Consultant) before the loan originates to collect, input and monitor actual energy and water usage at multifamily properties.

Consultant Qualifications

- No less than three years of experience collecting and evaluating multifamily utility consumption data
- Demonstrated experience obtaining and estimating multifamily tenant data

We prefer that the Benchmarking Data Consultant:

- Exchange data with Portfolio Manager® via Web Services
 - Receive and push utility data from/to both Portfolio Manager and utility companies

Consultant Responsibilities

- Collect Benchmarking Data
 - Aggregate whole property data
 - If aggregate data is unavailable, Benchmarking Data Consultant must collect:
 - Monthly owner-paid or owner-managed (RUBS) energy and water consumption
 - A minimum of 10% tenant-paid energy and water consumption
 - An estimate of the remaining tenant energy and water usage not collected
- Input Benchmarking Data into Portfolio Manager in the same property record created by the Green Consultant at the time of the Green Assessment®
- Review and confirm accuracy and quality of Benchmarking Data
- Submit annual Benchmarking Metrics as required in the Loan Agreement

Seller/Servicer Responsibilities

- Prior to origination, obtain certification from Borrower that a qualified Benchmarking Data Consultant is engaged to collect, input and monitor Benchmarking Data
 - Follow up with the Borrower to confirm that the Benchmarking Data Consultant has access to the property information in Portfolio Manager
- If Freddie Mac does not receive the required Benchmarking Metrics, the Servicer must contact the Borrower and request that the Borrower, through the Benchmarking Data Consultant submit the required Benchmarking Metrics