

Benchmarking Data Consultant Requirements

For all Green Up® and Green Up Plus® loans, borrowers must 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 the 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/Service 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.