***Note: this is a*** [***Building Innovation Hub***](https://buildinginnovationhub.org/) ***resource, developed with*** [***DOEE***](https://doee.dc.gov/) ***input. However, it is intended only as a guide and does not guarantee compliance with the District's requirements and laws. It is, ultimately, the responsibility of the individual Property and Verifier to complete the verification according to the District's regulations.***

[Building Owner] with an office at [address] (the “Owner”) and [Verifier Company] with an office at [address] (the “Verifier”) to perform work at [Property] at [address] (the “Property”).

*Limitations, assumptions, and exclusions are responsibilities of the Owner are outlined in italics throughout the scope of work.*

Sample Scope of Work: Third-Party Benchmarking Data Verification

Owner Responsibilities

In order to successfully complete this project, [Owner] will be responsible for the following:

* + Define a Project Team at the Project Kickoff including at a minimum:
		- One Owner Project Manager authorized to give direction on [Verifier’s] scope of work.
		- One Site Representative who will be responsible for coordinating access to the Property who is intimately familiar with the Property’s heating, ventilation, air conditioning, lighting, domestic hot water, and controls systems. The Site Representative must always accompany Verifier staff on site should Optional Task 3 be triggered.
		- Any additional people that must be consulted or informed throughout the process.
		- Provide the name and contact information for everyone on the Owner team.
	+ Supporting documentation, including:
		- Building drawings, including architectural, mechanical, plumbing, and electrical drawings
		- A breakdown of floor area by space use type and the supporting documentation used to determine this breakdown.
		- Documented proof of time of occupancy for major spaces (e.g., lease requirements) and space use characteristics (e.g., workstation or computer counts). [See here for specific details for space use types](https://www.energystar.gov/sites/default/files/tools/US_PropertyTypesUseDetails_Definitions_May2023.pdf), as these differ by property type.
		- Utility metering and account information, including aggregate meter lists if applicable. Aggregate meter lists should include the meter number(s) and service address(es).
		- If requested, photos of onsite utility meters; photos need to clearly be able to identify the meter number and (if applicable) space(s) served by the meter
		- Two years’ worth of base-building utility bills to understand current usage and expenditures.
	+ Managing the ENERGY STAR Portfolio Manager (Portfolio Manager) access for the Property, including:
		- Access to the existing Portfolio Manager entry for the Property, including the ability to set Property baselines and goals
		- Identification information used by Washington, DC to properly identify the Property (e.g., Real Property ID).
		- Updating the Property Notes section of each Property with the following information:
			* The name, title, telephone number, and email of the Approved District Data Verifier who completed the verification;
			* The date of the verification; and
			* The name of the credential, license, or certification, the issuing state or organization, and the license or certification number held by the Approved District Data Verifier. Please see section 20-3515.10 of the DCMR for additional details.
		- Updating Portfolio Manager data based on Verifier observations.
	+ Retaining the Data Verification Checklist provided by the Verifier for no less than three years following the completion of this scope; this checklist does not need to be provided to DOEE unless requested by DOEE.

Task 1: Data Review

Task 1.1 – Project Kickoff

At the start of the project, [Verifier] will:

* + Prepare an agenda and proposed project schedule.
	+ Schedule one Project Kickoff call with the Owner to confirm project timeline and discuss details of the scope of work.

Task 1.2 – Initial Data Review

Once [Owner] has provided the information indicated in the Owner Responsibilities section of this proposal, [Verifier] will:

* + Review collected data for the Property.
	+ Compare collected documentation and publicly available data (e.g., tax records) to the Portfolio Manager entry for the Property. If significant discrepancies between collected documentation and the Portfolio Manager entry are identified, the Verifier will notify the Owner via email. Significant discrepancies would include things such as notable differences in utility meter quantity (e.g., 500 meters onsite and only one meter in Portfolio Manager), meter readings, substantial differences in square footage, or other items as noted by the Verifier. This notification will trigger Optional Task 2. Additional detailed review tasks included in Optional Task 2 or Optional Task 3 are not included in the base scope of work.
	+ Develop a list of corrections and adjustments required for the Property’s Portfolio Manager entry to align it with other Property data.
	+ Provide this list of corrections to the Owner.
	+ Participate in one (1) conference call to discuss findings of the data review and corrections that need to be applied to the Portfolio Manager entry for the Property.

Task 1.3 – Completion of Data Verification Forms

Once [Owner] completes corrections provided in Task 1.2 to the Portfolio Manager entry for the Property, the [Verifier] will:

* + Review the corrected Portfolio Manager entry for each Property and ensure that recommended changes have been applied by the Owner.
	+ Complete the ENERGY STAR Data Verification Checklist ([*see here for a sample*](https://www.energystar.gov/sites/default/files/tools/DataVerificationChecklist_Sample.pdf)) and provide the completed checklist to Owner.

Task 1.4 – Project Recap

Once the Data Verification Checklist has been completed, the [Verifier] will schedule a 30-minute Project Recap call with the [Owner] to discuss findings, changes to Portfolio Manager entries, and next steps for the Property.

Optional Task 2: Detailed Data Review

*Optional Task 2 will trigger either upon request from the Owner or upon determination by the Verifier that significant discrepancies between provided documentation and the Portfolio Manager entry for the Property exist.*

[Verifier] will:

* + Perform area takeoffs based on architectural drawings in order to accurately identify the floor area of the whole Property as well as major spaces such as office space, parking garage space, etc.
	+ Identify adjustments to space use characteristics to align the Portfolio Manager entry for the property with provided documentation
	+ Compare aggregate meter lists to copies of meter photos taken onsite.
	+ If needed, lead discussions with DOEE around space use or energy configuration adjustments to the Portfolio Manager entry for the Property.

If the provided documentation is insufficient to complete Optional Task 2, the Verifier will notify the Owner via email. Scenarios where documentation is deemed insufficient may include, but not are limited to, unavailability of architectural drawings/plans, drawings where area takeoffs are unable to be accurately performed, lack of supporting documentation around space use characteristics, incomplete aggregate meter lists, meter photos that do not show meter numbers, or other similar items. This notification will trigger Optional Task 3.

Optional Task 3: Onsite Data Review

*Optional Task 3 will trigger either upon request from the Owner or upon determination of the Verifier that the Owner-provided data is insufficient to accurately verify the Property’s Portfolio Manager entry after beginning Optional Task 2.*

[Verifier] will perform one (1) onsite visit at the Property to verify the Portfolio Manager data. This visit will review:

* + Space use characterizations and space use details
	+ Metering configurations

The Verifier will not perform onsite survey measurements of square footages.

Optional Task 4: Data Correction

*Optional Task 4 would trigger at request of the Owner only.*

[Verifier] will update the Portfolio Manager entry directly instead of [Owner]. The Verifier will also provide a memo outlining findings from the data correction process. This memo will be no longer than four (4) pages.