

# Benchmarking Account Setup Protocol

## Project Manager Checklist



### 1. Inform Owner of HPD/HDC's Benchmarking Requirement

Notify the owner that the project is required to benchmark, as early in the development process as possible. Although nearly all HPD/HDC projects are required to benchmark, on rare instances benchmarking may not be required. Exemption reasons are listed on HPD's [Benchmarking Waiver Form](#). If one or more of these reasons applies to a project, the Project Manager should fill out the form, and have their Division's AC signs and submit the form to HPD's Sustainability Officer who must approve and sign the waiver to document exemption. If approved, the PM should upload the signed form in the "Documents" section of HPD Works. Click on the "Select Sub Document Type" drop-down and select "BENCHMARKING-ACCOUNT SETUP FORM". Select the file and upload the document.



### 2. Provide Owner with Pre-Qualified List of Benchmarking Service Providers

Provide owner with the [HPD/HDC Pre-qualified Provider List](#) immediately after notifying them of the benchmarking requirement. The owner must choose and enter into a contract with one of HPD/HDC's pre-qualified providers, without exception.



### 3. Verify that Owner has Chosen and Contracted with a Provider

**Preservation projects not requiring a Certificate of Occupancy:** Check-in with the owner to verify that the owner has entered into a contract with a pre-qualified benchmarking provider at least 1 month prior to loan closing.

**Projects requiring a Certificate of Occupancy:** Check-in with the owner to verify that the owner has entered into a contract with a pre-qualified benchmarking provider immediately after project completion.



### 4. Pre-populate Benchmarking Form and Submit to Owner

See Page 2 of the [Benchmarking Account Setup Form](#) for instructions on how to pre-populate Section A of the form.

**Preservation projects not requiring a Certificate of Occupancy:** Pre-populate Section A of the form and submit the form to the benchmarking provider at least 1 month prior to loan closing.

**Projects requiring a Certificate of Occupancy:** Pre-populate Section A of the form and submit the form to the benchmarking provider immediately after project completion.



### 5. Verify Account Set-up is Complete and Upload the Form to HPD Works

Verify the [Benchmarking Account Setup Form](#) has been submitted in Excel format (not PDF) and all fields in Section B-D are complete. If there is missing information in Sections B-D, contact the benchmarking provider to obtain missing information. After verifying all fields in Section B-D are complete, upload the form in the "Documents" section of HPD Works. Click on the "Select Sub Document Type" drop-down and select "BENCHMARKING-ACCOUNT SETUP FORM". Select the file and upload the document in Excel format.

**Preservation projects not requiring a Certificate of Occupancy:** Upload completed form prior to loan closing.

**Projects requiring a Certificate of Occupancy:** Upload completed form prior to conversion.