



South Portland, Maine

Benchmarking Ordinance Overview

"It is the vision of the City of South Portland to create a sustainable city that benefits the lives of all citizens through energy savings, preservation of the environment, economic opportunity and improvement of the health and welfare of the employees and people of the city."

– Excerpt from the City's Climate Action Plan

South Portland Benchmarking Ordinance & Community Quick Facts:

Population: 25,556 (2015 Est.)

Number of Staff Members Dedicated to this Initiative: 1

Number of Buildings Covered: 30

Approved Date: January 4, 2017

First Required Reporting: May 1, 2018

Building Types Covered: Municipal, public, residential and non-residential

Building Sizes Covered (Sq. Ft.):

- Municipal or School Building 5,000 ft² +
- Non-residential 5,000 ft² +
- Residential buildings 10 or more dwelling units
- Residential apartment complex (10 or more units)

Total Square Footage of Buildings Covered:

Greater than 375,000 ft²

Complete text of the ordinance can be found at: [Article XVII. Energy and Water Use Performance Benchmarking](#) – South Portland Zoning Code

January 2017

First month to begin maintaining data for the Energy Performance Report



May 1, 2018

First required date for submitting Energy Performance Reports. Reporting date of May 1 each year thereafter.



September 1, 2019

City publishes benchmarking for the first time. First year Energy Performance Report is not published.



May 1, 2023

First required date for five-year comprehensive energy audit. Audit date is May 1 of every fifth year thereafter.

Benchmarking Ordinances – Finding the Right Fit for your Community

Building energy benchmarking ordinances have traditionally been enacted only in major cities across the country. Northeast cities such as New York City, Philadelphia, and Boston have been leaders when it comes to the adoption of benchmarking policies.

These metropolises, along with others throughout the nation, that have enacted benchmarking policies are categorized by having high populations and large building stocks that consume substantial amounts of energy and produce significant carbon emissions. South Portland, on the other hand, is a very small community relative to the others. With a population of approximately 25,556 (U.S. Census Bureau), the City of South Portland is the smallest municipality (at the time of adoption) in the country to require benchmarking for public, commercial and residential properties.

Another unique aspect of South Portland's policy is how the policy was put into effect.

Unlike other cities, South Portland requires benchmarking as a part of their Zoning Ordinance specific to the Mill Creek area, a commercial center of the City. One of the benefits to building owners in this area is the financial incentive associated with the benchmarking ordinance. Owners are eligible to receive a development fee reduction incentive up to \$5,000 for compliance with the benchmarking policy. The newly adopted policy is viewed as an opportunity to spur growth in the economic center of the city.

Details of a benchmarking ordinance vary by location and should be based on the priorities of that particular community. Early stakeholder engagement is the key to enacting a policy that will get high compliance rates and be viewed as beneficial to community members. The City of South Portland has enacted a policy that meets the needs of the community and will help building owners make informed decisions about their energy usage going forward.

An Overview of the City's Benchmarking Ordinance with Sustainability Coordinator, Julie Rosenbach:

Q: What does the City plan to do with the results?

A: The data will inform the development of a Community Climate Action Plan, so targeted action items (e.g. incentive programs, forums, policies, etc.) can be developed to help businesses and multi-family buildings reduce their energy use.

Q: *What was the impetus for the benchmarking ordinance? What were the major drivers for getting the process started?*

A: The City's 2012 Comprehensive Plan, 2014 Climate Action Plan, and 2015 Mill Creek Master Plan all identify energy efficiency and conservation as a core part of the "green" vision for South Portland. The 2015 Mill Creek Master Plan specifically identifies energy and water use benchmarking as a short-term action to "make Mill Creek 'greener' in both a physical and environmental sense." A Benchmarking ordinance was spearheaded by the Planning & Development Office who learned about it through Urban Land Institute. The City was planning for the Mill Creek district's revitalization, they were looking for an environmental element to be part of it to ensure sustainable development. Existing buildings were seen as a core part of this. Passing a benchmarking policy was seen as an exchange for liberalizing zoning and making streetscape and other capital improvements.

Q: *What were some of the most significant barriers to the benchmarking ordinance?*

A: Two main barriers: (1) privacy concerns, particularly regarding apartments, and (2) administrative burden for building owners.

Q: *Who was involved in the process?*

A: The City's Planning and Development office lead the effort, and worked with the Sustainability Department. Building owners were also involved. Partnership with NEEP and assistance from IMT (Institute for Market Transformation) were very beneficial.

Q: *What are the key next steps for the City to ensure that building owners are prepared to act?*

A: The City will be working closely with building owners, contacting them by mail. Training workshop(s) will be held to help staff become familiar with the reporting requirement and portfolio manager. The City has secured funding to partially underwrite one year of energy management services from a local energy management company to assist building owners. Building owners in good standing will be eligible to receive an incentive in the form of up to \$5,000 in development fees waived for future renovations/development.

Q: *Does the City have any data on the number of hours it will take staff members to benchmark their buildings?*

A: This is a difficult number to draw out. The City developed a municipal energy database from scratch, which included all buildings, pump stations, lights, outlets, etc. Loading this info into portfolio manager was a small final piece. We have 31 municipal buildings being benchmarked.

An Overview of the City's Benchmarking Ordinance with Sustainability Coordinator, Julie Rosenbach:

Q: *As a small community, and as the only dedicated sustainability staffer, how AND why were you able to get the benchmarking policy adopted?*

A: I worked very closely with our Director of Planning & Development, who was interested and invested in bringing benchmarking to South Portland. In fact, it was his initiative originally. We didn't start from scratch, rather we based our ordinance on Cambridge's. We were able to get it passed with help from both NEEP and IMT who provided technical support and resources. We introduced benchmarking as a zoning amendment and paired it with looser zoning restrictions, which we were revising as part of a larger redevelopment plan. We did outreach to building owners. Our ordinance only applies to one part of the City, which allowed us to start this in essence as a pilot.

Q: *What are some of the current challenges you and building owners face with data collection and inputting that data into a benchmarking software?*

A: The ordinance goes into effect in May 2018, so we haven't begun our outreach and training for building owners just yet. We will be working with NEEP and EPA to help us with outreach materials and training. Right now the biggest challenge is that the electric utility does not provide whole building data. We are working with them on this and will be working with owners on how they can get this data in other ways.

Interested in Finding Out More about Building Energy Benchmarking? Check out the links below for more info:

NEEP Resources:

<http://www.neep.org/initiatives/energy-efficient-buildings/energy-rating>

DOE Resources:

<https://energy.gov/eere/slsc/building-energy-use-benchmarking>

SEE Action Network:

<https://www4.eere.energy.gov/seeaction/>

Contact **John Balfe** (jbalf@neep.org) for more information on building energy benchmarking. Or contact **Julie Rosenbach** (jrosenbach@southportland.org) for more information about the city's initiative.



South Portland Benchmarking Results

2018 UPDATE

CITY GOAL

Reduce community-wide greenhouse gas emissions 80 percent by 2050 and transition to 100 percent renewable energy in city operations by 2040.

2018 REPORTING CYCLE

This report presents an analysis of benchmarking data and compliance in the 2018 reporting cycle. During this reporting cycle, property owners submitted energy and water use data on their property in calendar year 2017. In the first year of the ordinance, the City is only disclosing whether or not the property is in compliance with the Ordinance. In subsequent years, the City will also disclose a summary of energy use information, and year-over-year comparisons.

COMPLIANCE RATE



= 96%
compliance

27/28

covered buildings reported to the city
(411,708 ft² out of 428,664 ft²)

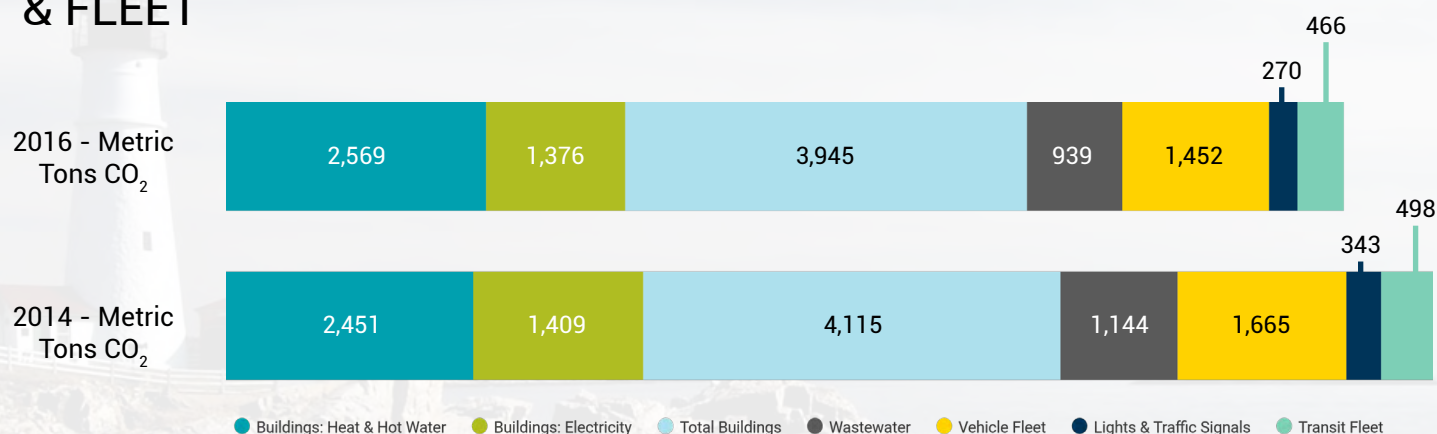
KEYS TO SUCCESS

- **Education and outreach** – How-To guides, personal outreach, and online resources ensured property owners were equipped with clear and informative guidance throughout the process.
- **Data quality and integrity** – Accurate energy and water use data proved central to informing appropriate energy efficiency changes and improvements in local building stock.
- **Support improvement** – Accelerate the rate of energy efficiency projects through targeted grant funding and programs informed by energy performance data.

PROGRESS OVER TIME: LEADING BY EXAMPLE IN SOUTH PORTLAND

The city of South Portland is committed to leading by example by benchmarking and completing a greenhouse gas inventory for municipal buildings and fleets. The information below summarizes South Portland's progress in the municipal sector since tracking began in 2014.

EMISSIONS BY SECTOR 2014-2016: MUNICIPAL BUILDINGS & FLEET



2014 TOTAL: 7,510 MT CO₂ 2016 TOTAL: 7,072 MT CO₂

5.8% reduction in emissions from 2014 to 2016

KEY TAKEAWAYS

From 2014 to 2016

- South Portland **reduced overall energy use by 2.2 percent** including municipal buildings, fleets, streetlights, and traffic signals
- Overall **emissions were reduced by 5.8 percent** including municipal buildings, fleets, streetlights, and traffic signals
- **City progress** – The City **exceeded a goal of reducing GHG emissions 17 percent** by 2017 over 2010 levels with a focus on improving building efficiency, transitioning to cleaner energy, and other external factors.

*This case study was prepared by NEEP with input from the City of South Portland, ME. For more information about building energy benchmarking, please contact **John Balfe** at jbalf@neep.org or **Julie Rosenbach** at rosenbach@southportland.org.*