

MGB ACADEMY · JOB AID

Baseline Documentation Standard*The data window, the normalization, and the record a reviewer can reconstruct***MGBA-EA-JA-03 · Version 1.0 · Released at Segment 3**

A capital provider tests three things: your baseline, your savings methodology, and your cost basis. This document covers the first. The reviewer's test is not whether your baseline is right — it is whether they can reconstruct it from what you gave them.

The standard

ELEMENT	REQUIREMENT
Data window	Twelve to twenty-four months of actual billed consumption. Twenty-four is preferred where available; it lets you see two heating and two cooling seasons and identify anomalies.
Completeness	All fuels and all meters serving the assessed property — electricity, natural gas, steam, chilled water, propane, fuel oil. Partial coverage must be stated as partial.
Source	Utility bills, utility-provided interval or billing history, or a Green Button export. Owner-transcribed spreadsheets are usable only with a stated note that they are unverified.
Normalization	Weather normalization is expected. Name the method, the degree-day base temperature, and the weather station used.
Benchmarking	Where a comparable exists, benchmark the property and cite the result — including the ENERGY STAR Portfolio Manager score and the property type it was scored against.
Adjustments	Occupancy changes, vacancy, process load changes, and schedule changes during the baseline period must be identified and their treatment stated.
Traceability	The reviewer must be able to move from the summary figure back to the billing records without asking you a question.

WHAT FAILS REVIEW

Nameplate assumptions substituting for metered data. A single summer bill annualized. Normalization applied but not named. A benchmark score quoted without the property type. A baseline year that includes a nine-month vacancy with no adjustment noted. In every case the finding may be correct — but the reviewer cannot verify it, so it is discounted.

Utility data request — send this at engagement

The single most common cause of schedule slip is starting the data request after the site visit. Send it at contract signature.

- Twenty-four months of billing history for every account serving the property, in the utility's own format.
- Account numbers, meter numbers, and the rate schedule on each account.
- Interval data where the utility offers it, or written authorization for you to request it directly.
- A list of any accounts serving tenant spaces that do not appear on the owner's bills.
- Gross floor area by use type, and the area actually conditioned.
- Operating schedule by space type, and any changes to it during the baseline period.
- Occupancy or vacancy history for the baseline period.
- Any process loads, tenant equipment, or seasonal operations that move consumption independent of weather.
- Prior audits, commissioning reports, or capital plans, if any exist.

Baseline record of documentation

Reproduce this block in the technical appendix. It is what a reviewer looks for first.

Baseline period	_____ to _____
Months of data	_____ (target 24; minimum 12)
Fuels and meters covered	_____
Data source	☐ Utility billing history ☐ Green Button ☐ Owner-provided (unverified)
Normalization method	☐ Heating/cooling degree-day ☐ Regression ☐ Other: _____
Degree-day base temperature	_____ °F
Weather station / data source	_____
Benchmark	☐ ENERGY STAR Portfolio Manager score: _____ Property type: _____ ☐ Not benchmarked — reason: _____
Baseline EUI	_____ kBtu/ft ² /yr (site) _____ kBtu/ft ² /yr (source)
Adjustments applied	_____
Known gaps and their treatment	_____
Prepared by / date	_____

Handling gaps

Gaps are normal. Silent gaps are not. When data is missing, do three things in order: state the gap, state what you substituted, and bound the effect on your conclusion. A baseline with a stated twelve percent uncertainty band is underwritable. A baseline with

an unstated gap is not, and when the gap is discovered later, everything else in the report is re-read with suspicion.

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