



BERDO WEBINAR: BUILDING PORTFOLIOS & INDIVIDUAL COMPLIANCE SCHEDULES

September 25, 2025



City of Boston Staff



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Objectives

Today's Webinar



- Review changes following an update of regulations
- Review Building Portfolios and Individual Compliance Schedules
- Navigate the application process for each
- Share recommendations to ensure smooth planning
- Answer questions you may have!

Agenda

Today's Webinar



1. BERDO Overview

- i. What is BERDO?*
- ii. What do we mean by first emissions compliance year?*

2. Regulations Update

3. Building Portfolios and Individual Compliance Schedules

- i. What is a Building Portfolio and what does the application process like?*
- ii. What is an Individual Compliance Schedule and what does the application process like?*

4. Resources and Reminders

5. Q&A Session

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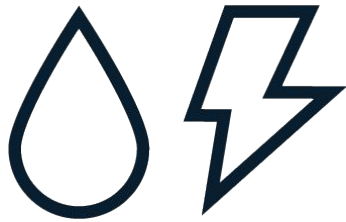
BERDO Overview



What is BERDO?

- The **Building Emissions Reduction and Disclosure Ordinance (BERDO)** is a local law that aims to address Boston's largest source of emissions: Buildings.
 - Existing buildings contribute **~70%** of the total community-wide emissions in Boston.
- BERDO requires medium and large buildings in Boston to reduce their greenhouse gas emissions over time to achieve **net-zero emissions by 2050**.
 - By complying with BERDO, **5% of buildings** in Boston could collectively **reduce city-wide emissions by nearly 40%**.

What is Required from Building Owners?



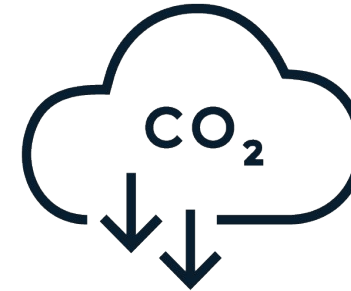
ANNUAL REPORTING

Report total energy and water use from the previous calendar year



THIRD-PARTY VERIFICATION

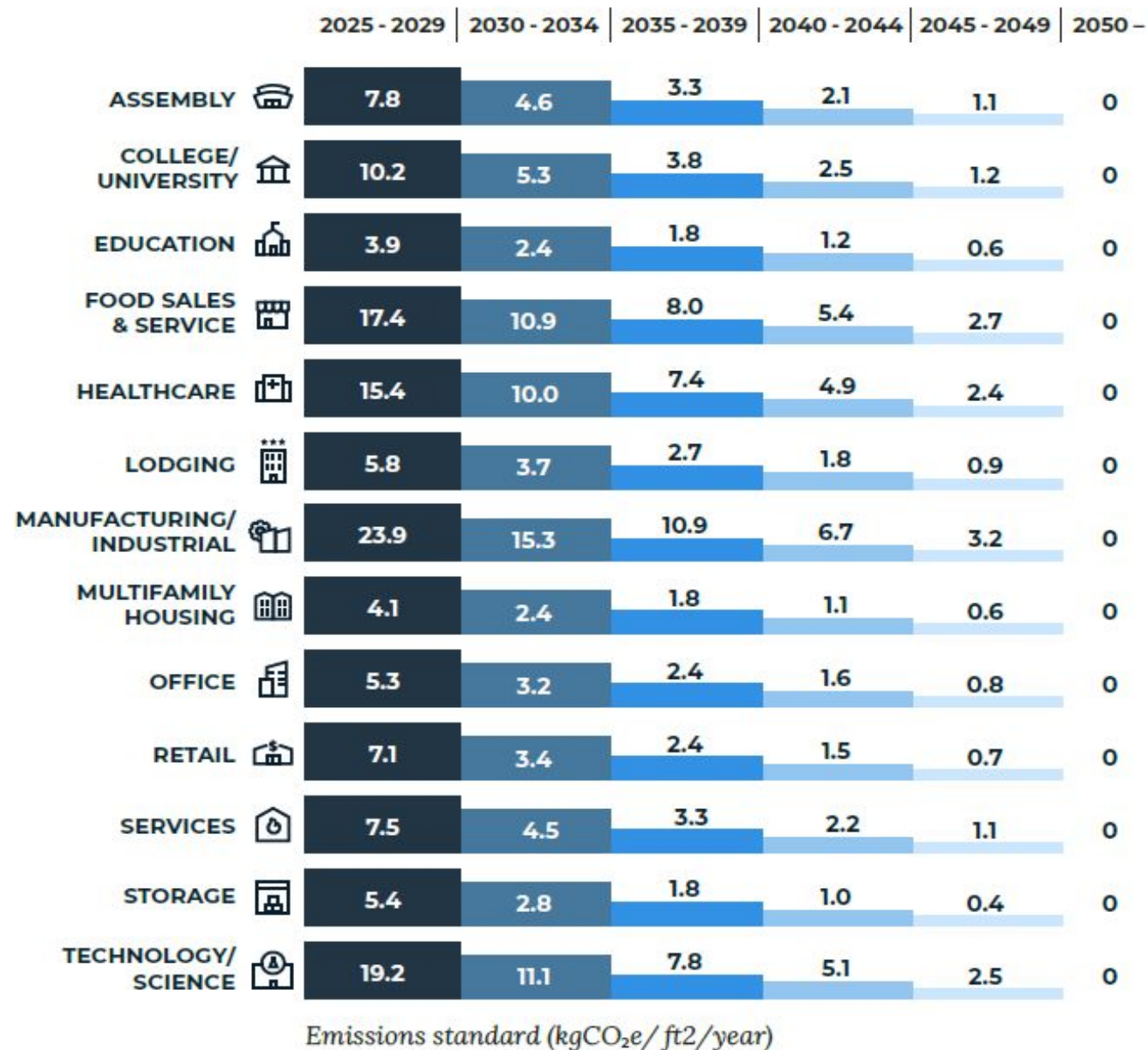
Third-party verify data for the first year of reporting and every "verification year" thereafter



EMISSIONS REDUCTIONS

Reduce annual emissions to stay under applicable emissions standard (emissions limit)

What are the Emissions Standards?



How Can Building Owners Comply With Emissions Limits?



REDUCE ENERGY USE IN BUILDINGS

Implement **building retrofits or improvements**. Examples include upgrading to high efficiency electric appliances and lighting, upgrading systems for heating, cooling, water heating, and cooking, improving insulation, tightening window seals, etc.



OBTAIN RENEWABLE ENERGY

Use on-site or off-site **local renewable generation** (rooftop solar, community solar, etc.).



INVEST IN THE COMMUNITY THROUGH ALTERNATIVE COMPLIANCE PAYMENTS

Make Alternative Compliance Payments (ACPs). ACPs are collected to mitigate emissions and fund the **Equitable Emissions Investment Fund** to support building decarbonization projects that prioritize benefits to Environmental Justice communities in Boston.

When are Buildings Subject to Emissions Standards?

RESIDENTIAL

NON-RESIDENTIAL

35+ units

**Starting emissions
compliance in 2025**



35,000 ft² +

**Starting emissions
compliance in 2025**



15 - 34 units

**Starting emissions
compliance in 2030**



20,000 - 34,999 ft²

**Starting emissions
compliance in 2030**



**Buildings have been annually reporting energy use since 2022.*

It's 2025, What do I Need to Know?

2025 will be the first year with with an emissions limit, so what does this mean for owners?*

September - December 2025

- Operate your building during calendar year 2025
- Take steps towards reducing building emissions
 - Good time to assess your options and [check your emissions projections](#)
- Apply for flexibility if needed

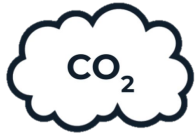
February - May 2026

- Request and report your building's 2025 energy and water data **by May 15**
- If you exceed your emissions, take actions such as purchasing eligible renewable energy or make Alternative Compliance Payments to get into emissions compliance

**For residential buildings with 35+ units and nonresidential buildings that are 35,000+ Sq Ft.*

Start Taking Action on Emissions Reductions

Plan for energy saving improvements and building electrification



UNDERSTAND YOUR BUILDING'S EMISSIONS

- Visit the [BERDO Calculator](#) to view your emissions projections and identify your source of emissions



GET A MASS SAVE ENERGY AUDIT




- [Commercial and Industrial Facilities](#)
- [Residential](#)
- [Eligible Income Based Assistance](#)



ASSESS YOUR BUILDING'S ENERGY PERFORMANCE AND START PLANNING

- Seek the assistance of a [building professional](#) to create a plan over time (Zero-Over-Time Plan)
- Take account of your capital budget, equipment age, and condition and consider upgrading and electrifying your building energy systems over time

Evaluate BERDO Flexibility Measures

	EMISSIONS REDUCTION REQUIREMENTS 	CAN BE COMBINED WITH 	APPLICATION DEADLINE 
Hardship Compliance Plans	Owners must propose an emissions reduction plan that fits the hardship they're facing. This may include asking for a different timeline and/or emissions limits based on their emission reduction plan.	<ul style="list-style-type: none"> • Building Portfolios 	<ul style="list-style-type: none"> • Rolling basis*: Short-Term for 2025 • July 1: Long-Term • October 1: Short-Term
Building Portfolios	Must comply with the portfolio-level Blended Emissions Standard in every compliance year and achieve net-zero by 2050.	<ul style="list-style-type: none"> • Individual Compliance Schedules; or • Hardship Compliance Plans 	<p>September 1</p> <p>Deadline will likely be extended this year - we encourage applying as soon as possible.</p>
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*For owners with unforeseen circumstances in 2025

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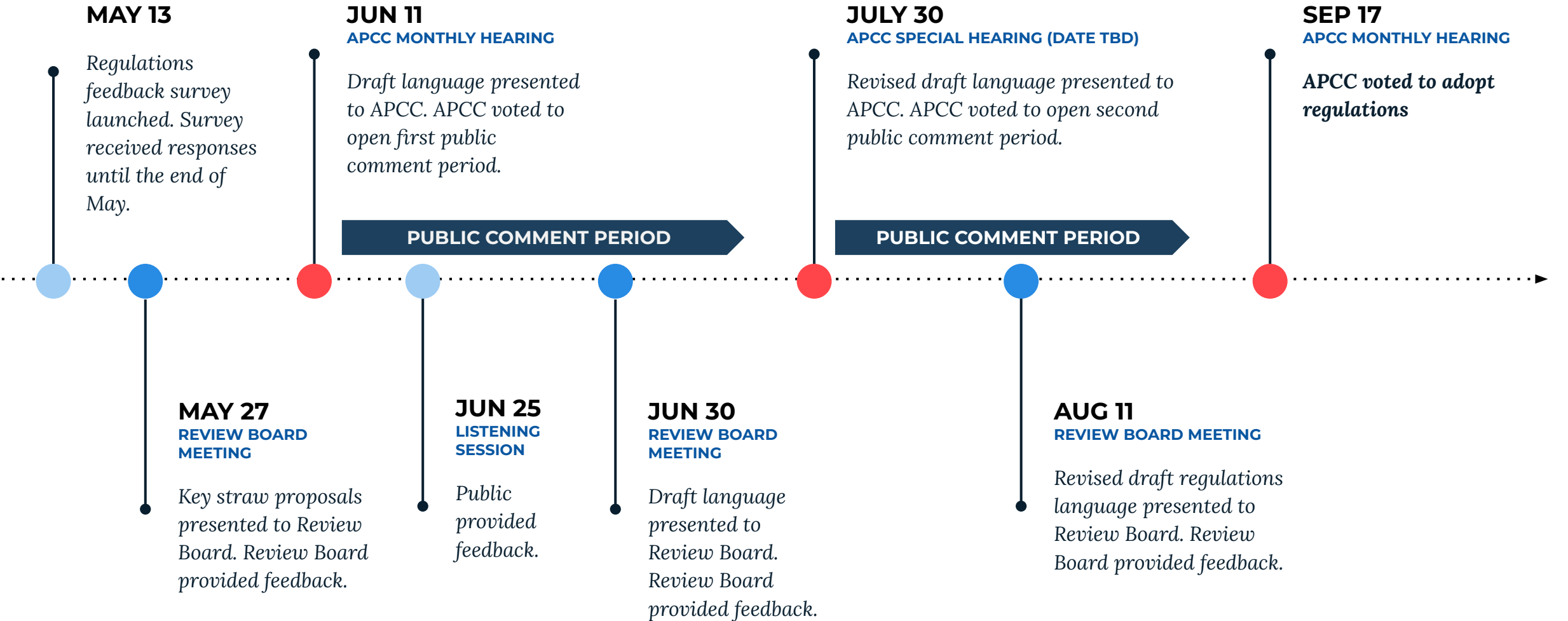
BERDO Regulations Update





2025 BERDO Regulations Update Timeline

Visit boston.gov/berdo-regulations to learn more about this process



Key Changes Impacting You Next Year



Third-Party Verification

- 2025 BERDO buildings will be required to provide third-party verification in 2026, but **only** for 2025 calendar year data.
- 2030 buildings will **not** be required to provide third-party verification in 2026, except for buildings whose first reporting year is 2026.

VERIFICATION YEAR	2025 BUILDINGS	2030 BUILDINGS
First reporting year	Yes, for the previous calendar year data	Yes, for the previous calendar year data
2026	Yes, for 2025 calendar year data	No, unless 2026 is your first year reporting
2031	Yes, for 2026 - 2030 calendar year data	Yes, for 2030 calendar year data
2036	Yes, for 2031 - 2035 calendar year data	
2041	Yes, for 2036 - 2040 calendar year data	
2046	Yes, for 2041 - 2045 calendar year data	
2051	Yes, for 2046 - 2050 calendar year data	

Key Changes Impacting You Next Year

Flexibility Measures

- Application deadlines for 2025 flexibility measures can now be extended by the Review Board.
 - *We encourage you to apply now for a Building Portfolio or ICS if it would help with your 2025 emissions compliance.*
 - *Stay tuned for upcoming information on official deadline extensions from the Review Board.*
- Building owners can request to extend the BERDO Review Board's voting timelines for all flexibility measures.
- It is no longer required to record decisions related to flexibility measures in the Registry of Deeds for any flexibility measures.

Exemptions for Solar Requirements

- If your building receives net metering credits from a solar system located outside Boston and that started operations in or after 2024 **due to extenuating circumstances**, you may request an exemption from the BERDO Review Board so that you can utilize said solar net metering credits for emissions compliance.
 - *Hardship Compliance Plans are no longer required to request such exemptions.*
 - *Stay tuned for more details on this exemption request process.*

Other Changes

Other

- Reporting procedures for Campuses, buildings with shared energy or water systems, and Campus District Energy Systems have been included in Regulations.
- Building owners may request a notice of compliance status from the Environment Department.
- Buildings subject to NZC Zoning may be added to a Building Portfolio with a Hardship Compliance Plan.
- Projected grid emissions factors for 2027 - 2050 have been updated.
- Annual emissions factors will be published every year no later than April 15.

Resources



- [Adopted Regulations](#)
- [Adopted Policies and Procedures](#)
- [BERDO Emissions Factors List](#)

The BERDO Team is working to update all guidance documents to align with the updated regulations and policies.

Q&A Break




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Building Portfolio

What is it?



Flexibility Measures

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What is a Building Portfolio?

A Building Portfolio is a flexibility mechanism that:

- ✓ Allows owners with more than one building subject to BERDO to comply with a single portfolio-level Blended Emissions Standard
- ✓ Must be approved by the BERDO Review Board
- ✓ Can be used in conjunction with Individual Compliance Schedule or Hardship Compliance Plan

A Building Portfolio is not:

- ✗ An exemption to complying with emissions standards
- ✗ An exemption from annual reporting and third-party verification requirements for individual buildings

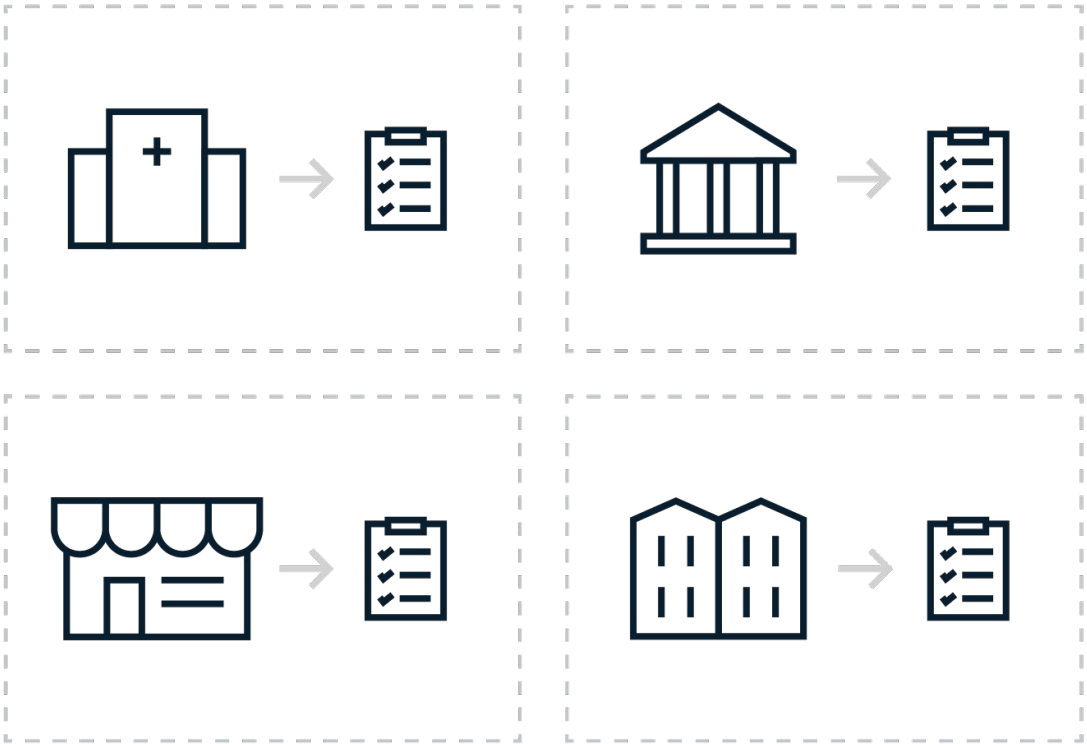
Emissions Compliance for Building Portfolios

Building Portfolios comply with a single portfolio-level emissions limit



BUILDING BY BUILDING APPROACH

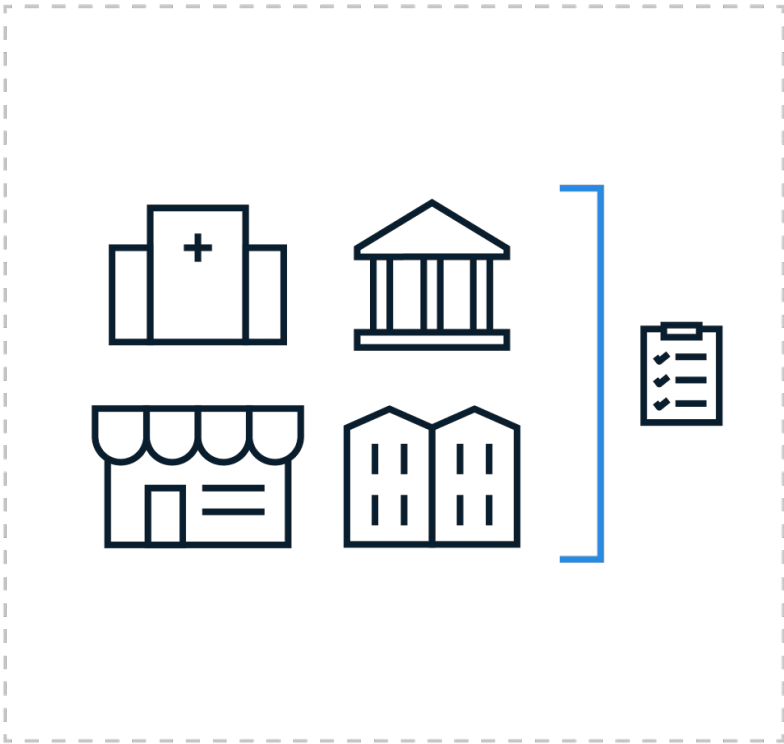
Multiple Emissions Standards



VS

BUILDING PORTFOLIO

One Portfolio-level Emissions Standard



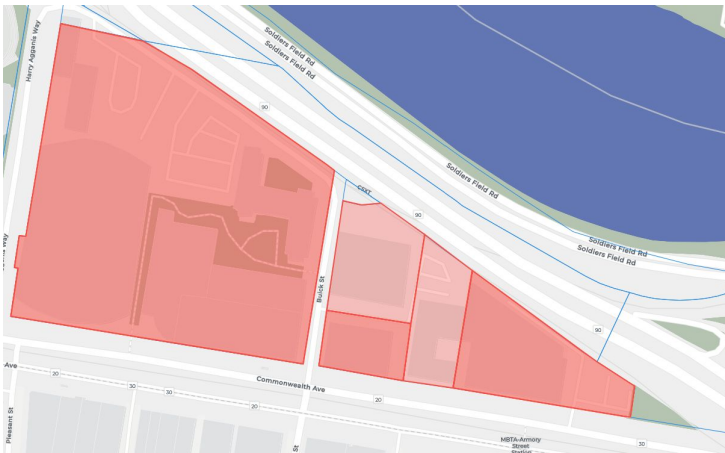
Options for “Same Owner” When Applying for a Portfolio

- ❑ The same Owner as listed in the **records of the Boston Assessing Department**
- ❑ The same **Sponsor** of two or more **Deed-Restricted Residential Buildings**
- ❑ The **same majority owner or beneficial owner** (provided that the beneficial owner is the entity legally responsible for BERDO compliance) **of two or more special purpose entities or charitable organizations**
- ❑ An **entity that, directly or indirectly through its subsidiaries, exercises control over, or acts as managing member or managing partner** (provided that the entity, directly or indirectly through its subsidiaries, (i) has ownership interest, (ii) is the entity legally responsible for BERDO compliance, and (iii) in the case of a limited partnership, is a general partner) of **two or more special purpose entities or charitable corporations**
- ❑ **Charitable organizations under common ownership and control of an entity that is legally responsible for BERDO compliance**

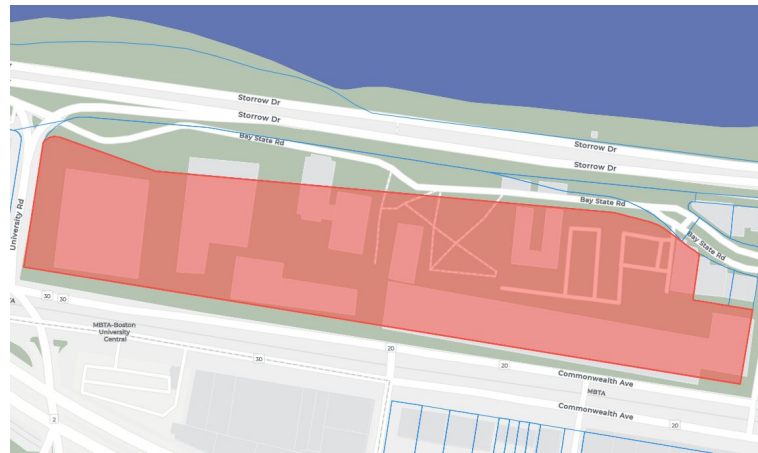
Building Portfolios Configurations

Building Portfolios can include buildings physically close or far from each other.

BUILDINGS IN ADJACENT TAX PARCELS



BUILDINGS IN THE SAME TAX PARCELS



BUILDINGS IN DIFFERENT TAX PARCELS



** All Buildings must be located in the City of Boston and covered by BERDO.*

The background of the slide is a dark blue aerial view of a city, overlaid with a white line-art map of a city grid. The map shows various building footprints, streets, and parks, providing a spatial context for the building portfolios discussed in the presentation.

Building Portfolios

Application Process



Application Forms



- [BERDO Flexibility Application portal](#) is available online. This website contains online forms for Building Portfolios and Individual Compliance Schedules.
- You **cannot** save your application form and continue later, so please [review the PDF application file](#) so you may prepare your answers and submit the application form in one sitting.

Get started by visiting the [application portal](#) ↗

What are the Eligibility Criteria for Applying?

- All Buildings in the Building Portfolio must share the **same Owner** or be included in the **same approved Institutional Master Plan** (IMP).
 - *Buildings from different IMPs may not be combined into a single Building Portfolio unless all Buildings share the same Owner.*
- The Building Uses, Energy Use, Gross Floor Area, and Emissions data of all Buildings in the Building Portfolio were **third-party verified** during the last applicable Verification Year. *
- All Buildings in the proposed Building Portfolio are **in compliance** with the Ordinance and Regulations. *
- None of the Buildings in the proposed Building Portfolio are **vacant**. *

** You may apply via pathway 3 for a Building Portfolio if you do not meet one or more of the starred eligibility criteria, but you will be required to explain.*

Application Pathways

All Building Portfolios must be approved by the Review Board

PATHWAY 0

Buildings with a single Owner located in a **single parcel** that sum to at least 20,000 sq. ft. or 15 units, but would not otherwise be individually subject to BERDO.

No hearing required for approval

PATHWAY 1

Buildings that are individually subject to BERDO and **do not** trigger environmental justice requirements

No hearing required for approval

PATHWAY 2

Buildings that are individually subject to BERDO and **do** trigger **environmental justice requirements**

Review Board may hold a hearing

PATHWAY 3

Buildings that do not meet one or more eligibility criteria **OR**

Owner is unable to calculate blended Emissions standard **OR**

Owner is also applying for or already has an Individual Compliance Schedule (ICS)

Review Board shall hold a hearing

Criteria that Trigger an EJ Requirement

Building Portfolios that include any of the following buildings trigger **Environmental Justice (EJ) requirements**:

- ❑ Any on-site **Campus District Energy System** that uses non-renewable or CO2e emitting fuels and are located in EJ Populations
- ❑ Any on-site **Combined Heat and Power plant** that uses non-renewable or CO2e emitting fuels and are located in EJ Populations
- ❑ Any **industrial or manufacturing** Buildings located in EJ Populations
- ❑ Any **energy/power station** Buildings located in EJ Populations
- ❑ A **combination** of **Residential Buildings** located in **both EJ and non-EJ Populations**
- ❑ A **combination** of **Deed-Restricted Residential Buildings** and **other Residential Buildings**, regardless of location

Environmental Justice Requirements

For Building Portfolios with an EJ concern

AT THE TIME OF APPLICATION

Application will require:

1. **EJ map of Building Portfolio**
2. **Brief narrative** on anticipated near-term compliance actions and plans to develop an **Emissions Standard Compliance Plan**.

WITHIN TWO YEARS OF APPROVAL

Submit **Emissions Standard Compliance Plan**.

Review Board may decide to hold public hearing to evaluate plan and add special conditions.

EVERY YEAR THEREAFTER

Submit **annual progress report** by July 15.

EVERY VERIFICATION YEAR THEREAFTER

Submit **updated Emission Standard Compliance Plan**

- An **Emissions standard compliance plan** is a planning document developed by a Building Portfolio Owner.
- The document must describe the Owner's plans **to prioritize distribution of benefits** associated with BERDO compliance in **Buildings in their Building Portfolios that are located in EJ Populations and/or serve as affordable housing**.

Application and Hearing Process



Public Meeting	Public Hearing
<ul style="list-style-type: none">• The Review Board will have public meetings for Pathway 1 and 2 applications:<ul style="list-style-type: none">◦ Meeting: Meetings do not include a public comment period and do not require a presentation by the applicant.	<ul style="list-style-type: none">• The Review Board may have a hearing for Pathway 2 applications and will have a hearing for Pathway 3 applications:<ul style="list-style-type: none">◦ Hearing: The applicant is expected to present and there is an opportunity for a public comment period.

Application and Hearing Process



Review Board Votes

Pathway 0: Votes to approve with standard conditions.

Pathway 1: Votes to approve with standard conditions or request for more information.

Pathway 2: Votes to approve with standard conditions, deny, or vote to have a hearing.

Pathway 3: Votes to approve with standard conditions and/or special conditions, deny, or request for more information.

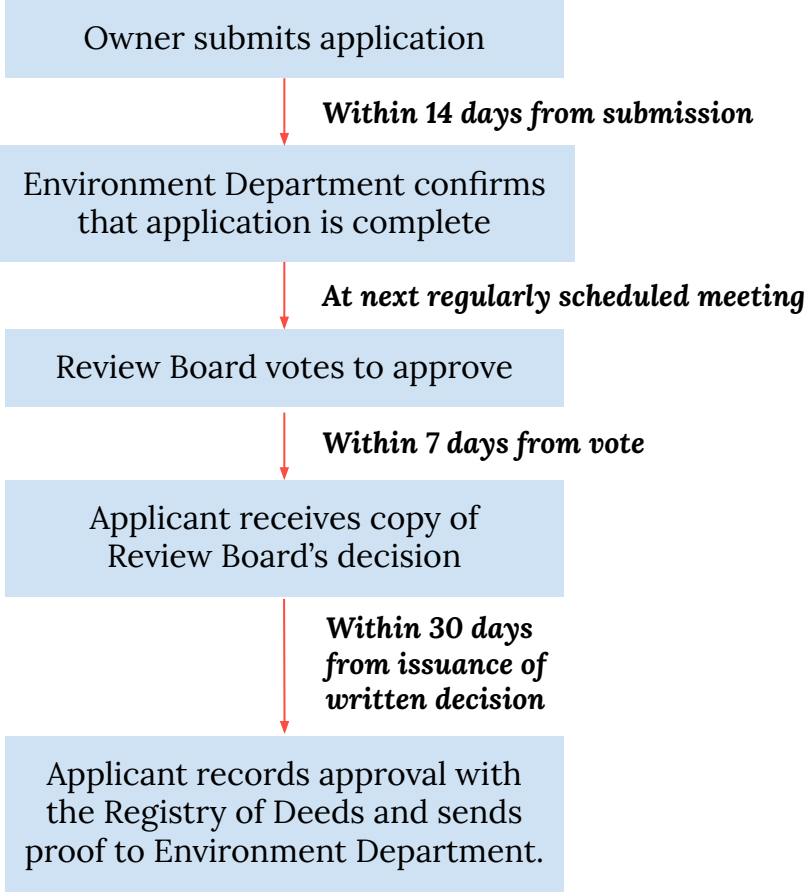
Application and Hearing Process



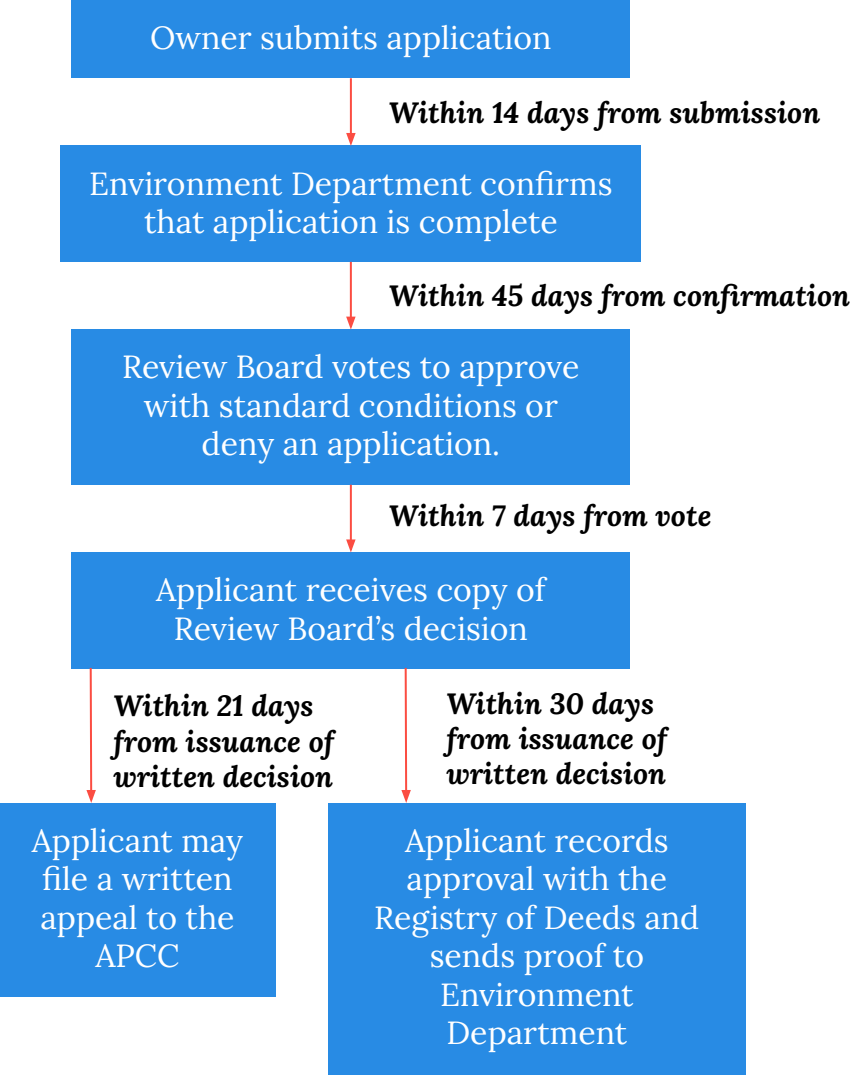
Standard Conditions for all Building Portfolios:

- *Timely compliance with reporting and third-party verification requirements.*
- *Timely compliance with the requirements in Section XI.b, including, when applicable, the submission of a satisfactory Emissions standard compliance plan.*
- *The Review Board or its designee may inspect any Building that is part of an approved Building Portfolio, at reasonable times and with reasonable notice, in order to assess compliance with the terms and conditions of said Building Portfolio.*

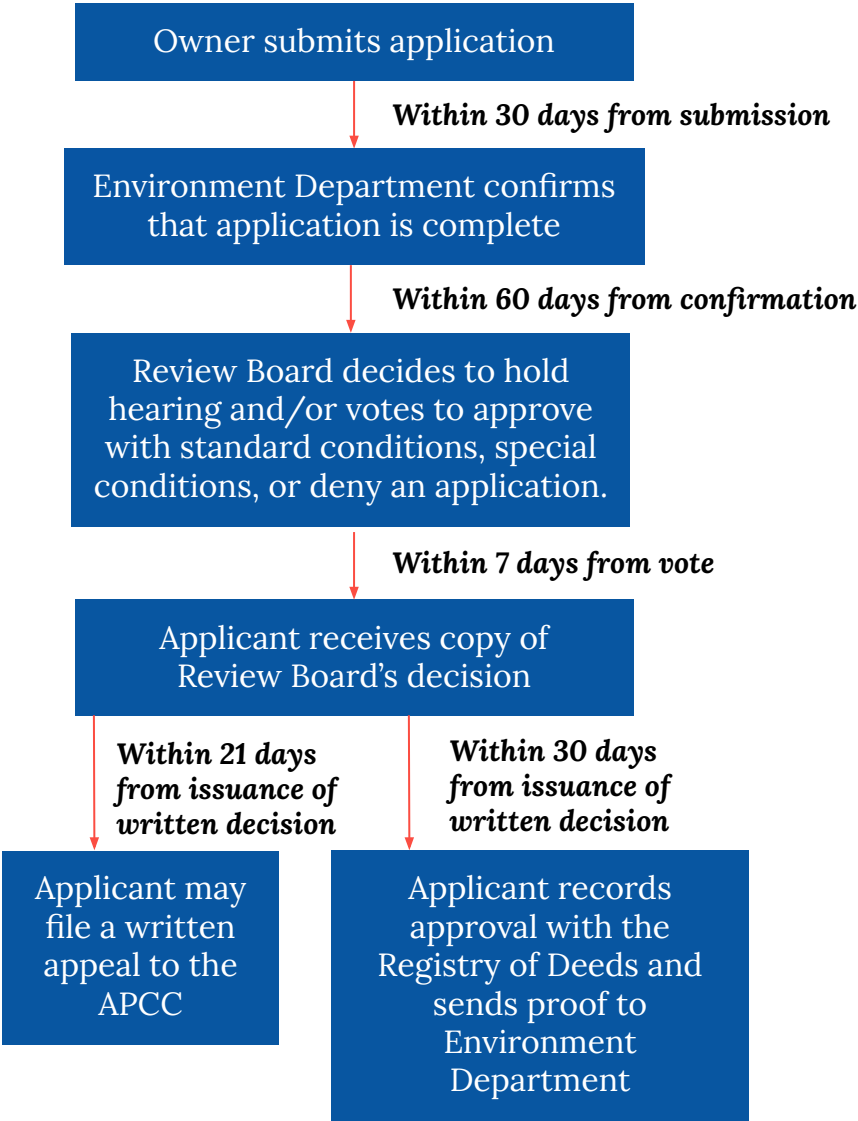
PATHWAY 0



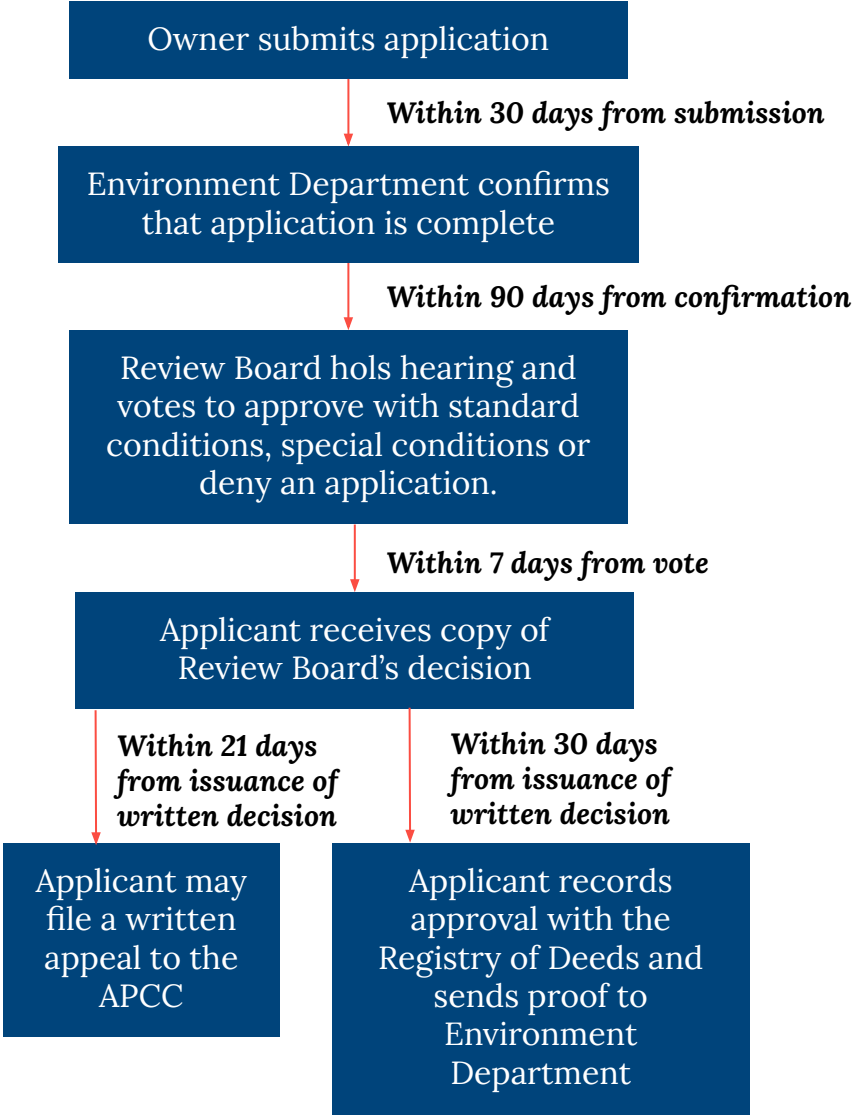
PATHWAY 1



PATHWAY 2



PATHWAY 3



Tips for Applying

1. **Check out the Portfolio Blended Emissions Standard Template**
 - [Link to template](#) to understand your possible portfolio level emissions standard
2. **Review the [Building Portfolio application PDF](#) ahead of time**
 - Get familiar with the questions because you must submit your form in one sitting.
3. **Check out the EJ Map How-to-Guide**
 - [EJ map how-to-guide](#)
 - [Interactive EJ Map](#)
4. **[Schedule a one-on-one](#) with the Review Board team before submitting your application**
 - Get your questions answered from the Review Board team.

Deadline for Applying



TO HAVE A BUILDING PORTFOLIO IN EFFECT FOR 2025

- **September 1** was the deadline to apply for a Building Portfolio, but the BERDO Review Board has the ability to extend this year and we believe it will do so.



Key takeaway, **apply as soon as possible**. We will work with you to ensure your application applies to 2025

Emissions Standard Compliance Plan

Content requirements. More details can be found in adopted policies.

- ❑ **EJ map** of Building Portfolio (*updated*)
- ❑ Narrative description of **plans to prioritize distribution of benefits** associated with BERDO compliance in Buildings located in EJ Populations and affordable housing, including **affordability**, improvements to **quality of life and public health**, **climate resilience**, and **investments in emission reduction strategies**.
- ❑ Narrative description of any **planned compliance efforts** that are expected to be implemented across the Building Portfolio **over the next two compliance cycles**.
- ❑ (*If applicable*) Narrative description of any expected strategies to reduce emissions from on-site Campus District Energy Systems, Combined Heat and Power plants, industrial or manufacturing Buildings, and energy/power station Buildings.
- ❑ The types of heating systems, cooling systems, stoves, ventilation, and any air quality monitoring and filtration systems that are currently in operation for each Building.




Q&A Break

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Individual Compliance Schedule

What is it?

Flexibility Measures

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*For owners with unforeseen circumstances in 2025

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*For owners with unforeseen circumstances in 2025

What is an Individual Compliance Schedule?

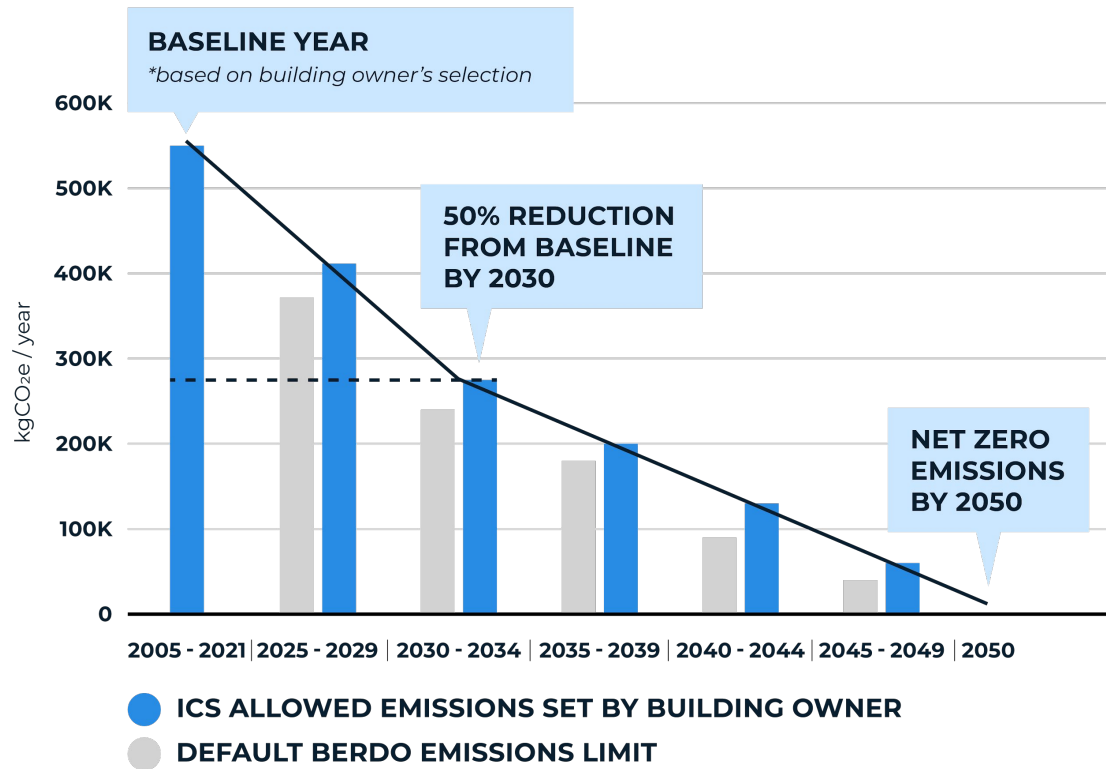
An Individual Compliance Schedule is a flexibility mechanism that:

- ✓ Allows owners to use standards that benchmark against themselves based on a baseline year's emissions data
- ✓ Must be approved by the BERDO Review Board
- ✓ Can be used in conjunction with a Building Portfolio

An Individual Compliance Schedule is not:

- ✗ A custom reduction schedule of one's choice, there are requirements that must be met
- ✗ A Hardship Compliance Plan

What are Individual Compliance Schedules (ICS)?



- ❑ Emissions reduction schedule must be composed of **absolute emissions standards** (kgCO₂e / year) with **5-year increments** (i.e., 2025, 2030, 2035, 2040, 2045, 2050).
- ❑ Emissions standards must decline on at max of two **linear or better bases**.
- ❑ The emissions reduction schedule must achieve a **50% reduction in absolute emissions** from the baseline year **to 2030**.
- ❑ The emissions reduction schedule must achieve a **100% reduction in absolute emissions** from the baseline year **to 2050**.
- ❑ Baseline year must be between **2005** and **2021**.
- ❑ If the ICS is for a Building Portfolio, each Building may have different baseline years, but there will be only **one emissions standard for the whole Building Portfolio**.

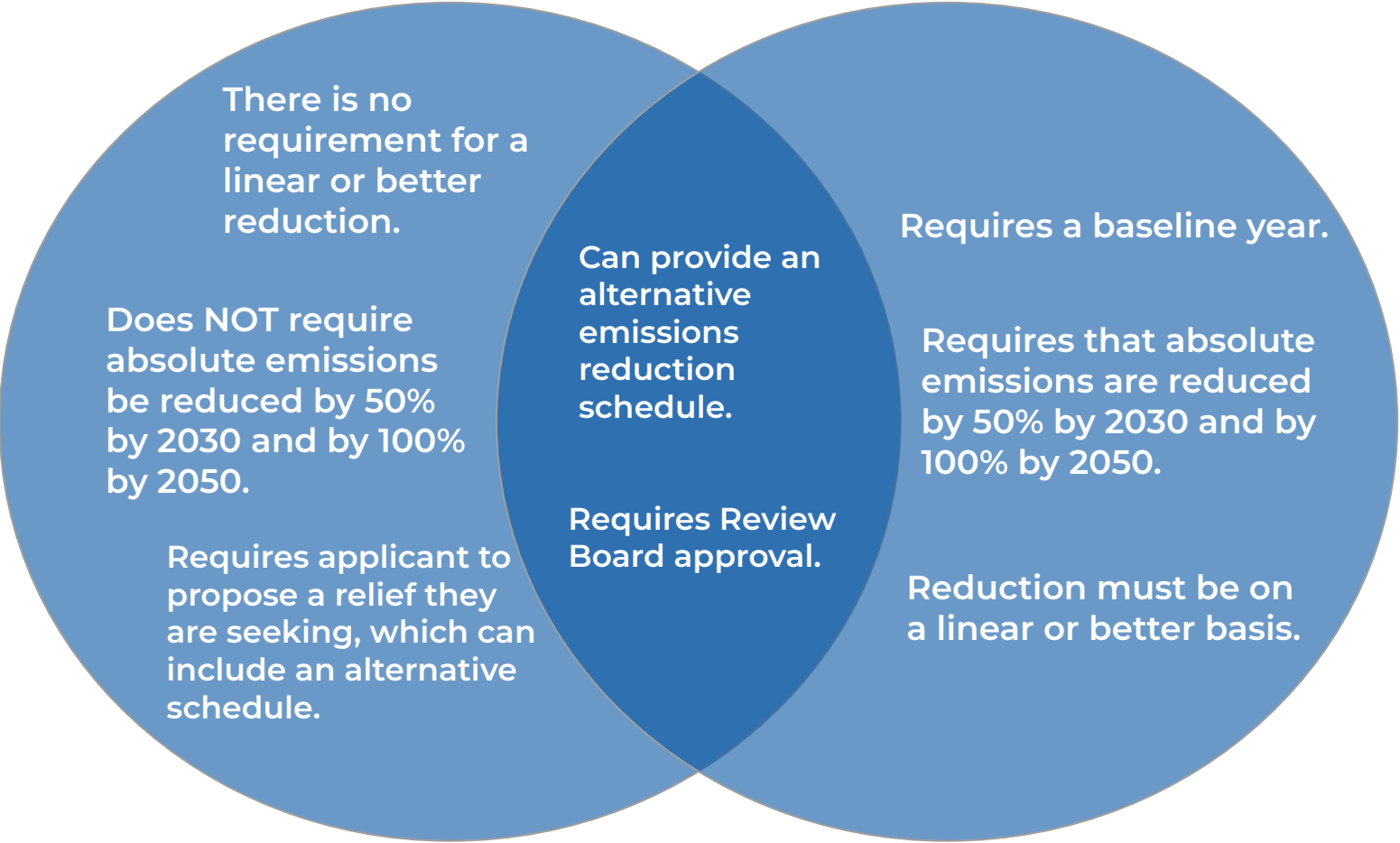
Individual Compliance Schedule v Hardship Compliance Plans

Differences and similarities



Hardship Compliance Plan

Individual Compliance Schedule





Individual Compliance Schedules

Application Process

Application Forms



- [BERDO Flexibility Application portal](#) is available online. This website contains online forms for Building Portfolios and Individual Compliance Schedules.
- You **cannot** save your application form and continue later, so please [review the PDF application file](#) so you may prepare your answers and submit the application form in one sitting.

Get started by visiting the [application portal](#) ↗

What are the Eligibility Criteria for Applying?

- For an individual building or for each building in a Building Portfolio, the **Energy use, Gross Floor Area, Building Use(s), and Emissions Factors** data for the year selected as the baseline have been **third-party verified.** *
- For an individual building or for each building in a Building Portfolio, the **total Gross Floor Area has not been reduced from the baseline year by more than 10%** and the **largest primary Building Use remains the same.**
- All Buildings are currently **in compliance** with reporting requirements.

* *Data is only required for the selected baseline year. Owners do not need to provide data for every year between the baseline year and today.*

** *Owners may still apply if you do not meet one or more of the eligibility criteria, but you will be required to explain.*

Data Sources for Baseline Year Data

- ❑ **Energy use:** Historical utility data or utility bills, public reports meeting a third-party standard or accreditation (including internally produced sustainability reports), or any other records deemed acceptable by the Review Board.
- ❑ **Gross Floor Area:** Records of Boston Assessing Departments or calculate the historical Gross Floor Area according to existing guidance by the Environment Department.
- ❑ **Emissions Factors**
 - **Electricity:** [ISO New England Historical Emissions Factors](#)
 - **District Energy Systems:** historical Emissions Factor provided by operator or, if operator fails to provide, Emissions Factor ENERGY STAR Portfolio Manager.
 - **Campus District Energy Systems:** calculated historical Emissions Factor according to accepted methodologies or Emissions Factor from ENERGY STAR Portfolio Manager.
 - Owners may propose alternative Emissions Factors to the Review Board. The Review Board shall have the discretion to accept or deny alternative Emissions Factors.

Application and Hearing Process



Application Process

- Owners applying for a Building Portfolio and an Individual Compliance Schedule **concurrently** must complete the application form for **Building Portfolios first (Pathway 3)** and then submit an Individual Compliance Schedule application form.

Public Meeting	Public Hearing
<ul style="list-style-type: none">• The Review Board may hold a hearing to evaluate applications for individual Buildings or for already approved Building Portfolios.	<ul style="list-style-type: none">• The Review Board shall hold a hearing to evaluate applications that simultaneously apply for an Individual Compliance Schedule and Building Portfolios.

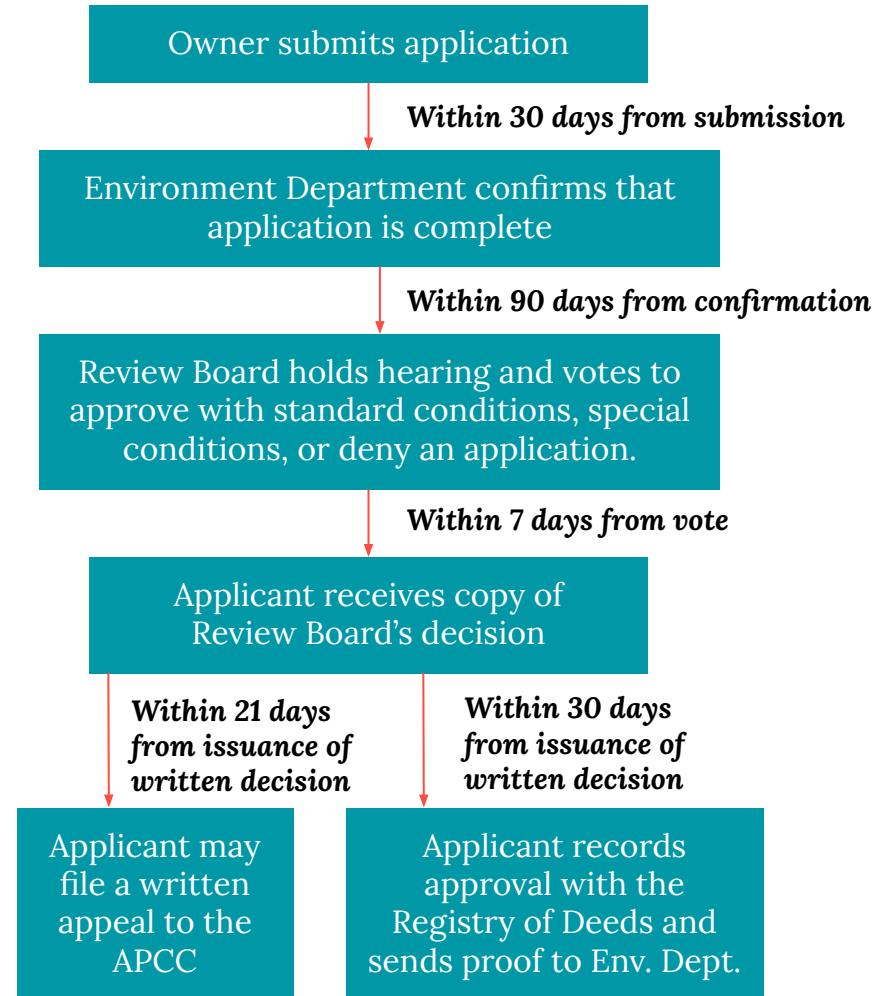
Application and Hearing Process



Standard Conditions for all Individual Compliance Schedules:

- *Timely compliance with reporting and third-party verification requirements.*
- *Timely compliance with the requirements for ICS*
- *The Review Board may include special conditions for ICS that do not meet the eligibility criteria for ICS.*

Application Timeline



Tips for Applying

1. Check out the [Individual Compliance Schedule Template](#)
 - *Link to template to understand your possible reduction schedule*
2. Review the [Individual Compliance Schedule application PDF](#) ahead of time
 - *Get familiar with the questions because you must submit your form in one sitting.*
3. [Schedule a one-on-one](#) with the Review Board team before submitting your application
 - *Get your questions answered from the Review Board team.*

Deadline for Applying



TO HAVE AN INDIVIDUAL COMPLIANCE SCHEDULE IN EFFECT FOR 2025

- **September 1** was the deadline to apply for an Individual Compliance Schedule, but the BERDO Review Board has the ability to extend this year and we believe it will do so.



Key takeaway, **apply as soon as possible**. We will work with you to ensure your application applies to 2025



Resources and Reminders

BERDO Additional Resources



BERDO Fest

BERDO Fest will serve as a central hub for Boston building owners and property managers to build connections with experts and professionals across the building decarbonization ecosystem.

More information and the registration link can be found at boston.gov/berdo-fest

- **Date:** Thursday, October 23, 2025
- **Time:** 12:00 p.m. – 6:00 p.m.
- **Location:** Artists for Humanity at 100 W 2nd Street, Boston, MA 02127



Take Advantage of BERDO Resources

1. Project your future emissions

- [Test out the BERDO Emissions Calculator](#)

2. Meet with a BERDO team member about emissions compliance

- [Schedule a one-on-one BERDO Building Consultation](#)

3. Apply for free assistance in BERDO reporting

- [Apply for free reporting services and third-party verification](#)

4. Apply to receive free zero-over-time assistance

- [Apply for the Building Decarbonization Advisor Program](#)



Other Resources

BERDO Quick Links

- boston.gov/berdo ↗
- boston.gov/berdo-review-board ↗
- boston.gov/RetrofitHub ↗

Mass Save Quick Links: No-cost Mass Save energy audits, engineering studies, rebates and incentives:

- Non-residential: MassSave.com/Business ↗
- Residential: MassSave.com/Multi-Family ↗
- Rebates: MassSave.com/Rebates ↗

Q&A Session

THANK YOU

A recording will be available at:
boston.gov/berdo ↗

