

## **Home Performance with ENERGY STAR (HPwES) Stakeholder Meeting**

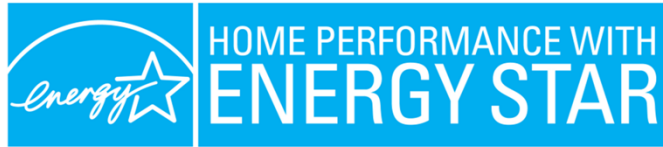
Residential Energy Efficiency Solutions Conference  
Arlington, VA July 2012

**David Lee**  
U.S. DOE

**HPwES Consulting Team**  
SRA International

## Session Agenda

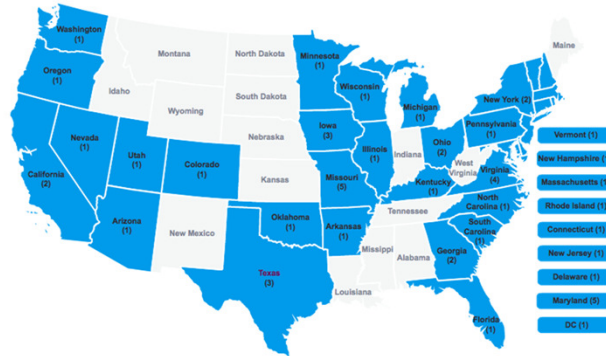
- Update on Current HPwES Program
- Near Term Goals
- Sponsor Success Stories
- Preliminary Review of Stakeholder Comments Received for HPwES v2 Proposal
- Prioritization of Activities and Next Steps



# *HPwES Program Update*

# HPwES Is Ten Years Old!

- We have a strong partnership base with over 50 Sponsors in 34 states, including DC – reaching
- The home performance industry is growing across the nation with over 1,800 participating contractors



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The HPwES Program is implemented by different organization types and works well for many types of Sponsors. The current breakout of participating Sponsors by type is:

Conventional Utilities – 28

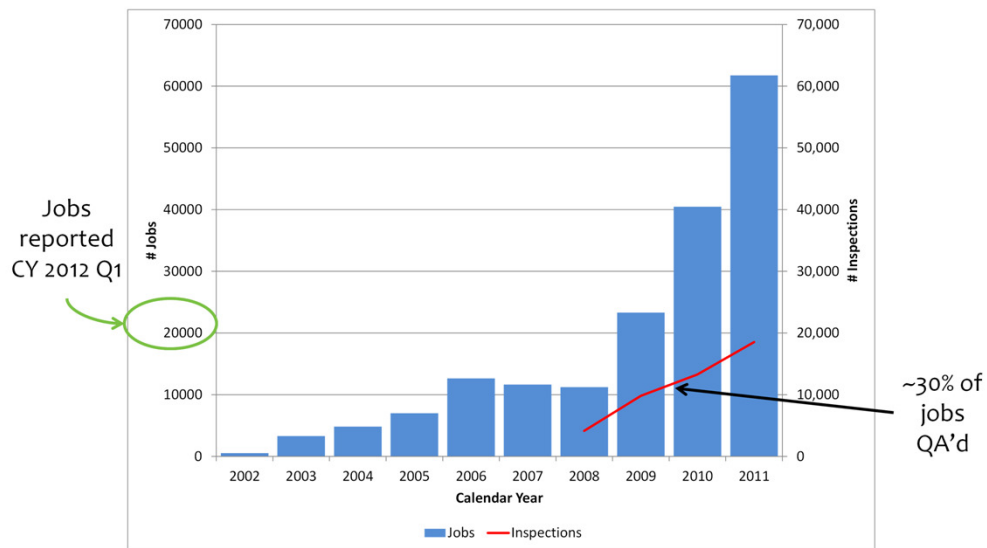
Energy Efficiency Utilities – 4

State Governments – 7

Non-Profits – 13

Financial Institutions – 1

## Nearly 200,000 HPwES Improvements



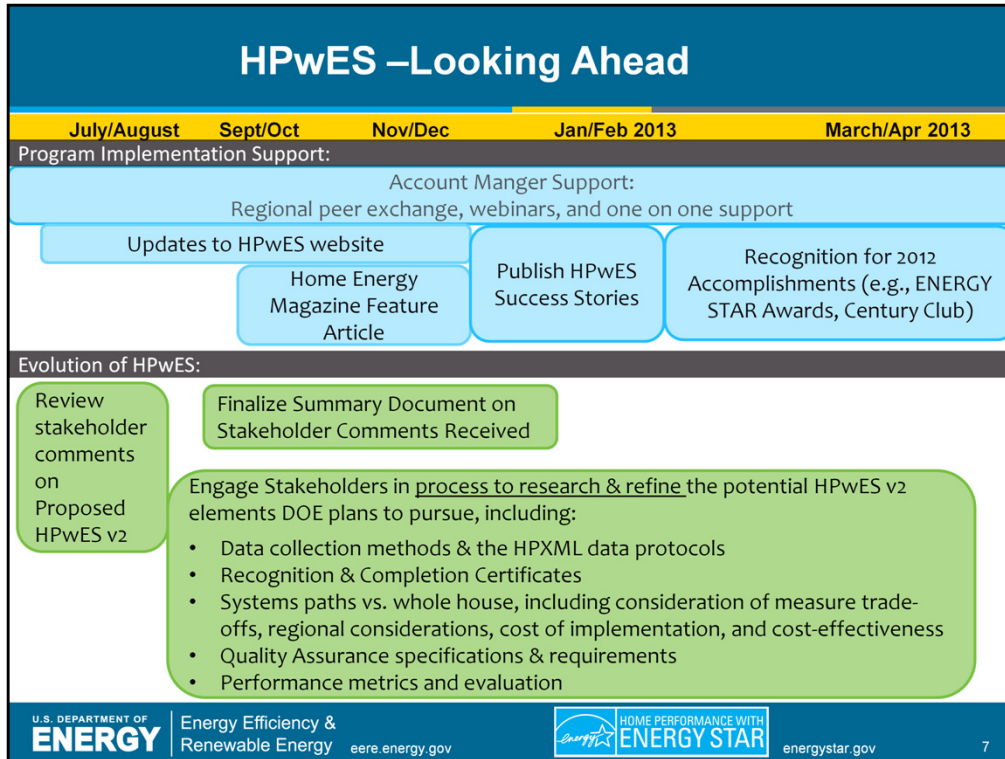
As of the first week of July 2012, we reached the 200,000 mark for completed projects. Based on Q1 reporting, we expect to complete 70-80,000 projects in 2012.

The minimum required sampling rate for field inspections of completed projects is 5%, however most Sponsors exceed this minimum by a significant margin. On average, 30% of all HPwES projects nationally receive an in-field QA inspection.

## Activities and Goals, Next 6 Months...

Activity Area	Planned Projects
Data and Reporting	<ul style="list-style-type: none"> <li>• Launch project level (HPXML) data pilot</li> <li>• Coordinate with BPD, SEED and related efforts</li> </ul>
Communications, Tools, and Resources	<ul style="list-style-type: none"> <li>• Update HPwES website (www.energystar.gov)</li> <li>• Coordinate w/ BBNP</li> <li>• Update/publish case studies and success stories</li> </ul>
Account Management	<ul style="list-style-type: none"> <li>• Regional Peer Exchange</li> <li>• Webinars</li> <li>• Continued one-on-one support</li> <li>• Template for Annual Sponsor Reports</li> </ul>
HPwES v2	<ul style="list-style-type: none"> <li>• Summary Report on Comments</li> <li>• Prioritized Action Plan</li> <li>• Identify Pilot Opportunities</li> <li>• Continued Stakeholder Engagement</li> </ul>

As we continue to evaluate the results of the open comment period on the proposed v2 of HPwES and wait out final details of the federal budget, our efforts are focused on continuing to enhance the delivery of the existing version of HPwES and identifying opportunities to pilot new approaches with our existing Sponsor base.



This is a preliminary timeline of the activity focus areas for the HPwES team over the next 6-10 months.

## Sponsor Showcase



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Three of our Sponsors offered brief presentations showcasing some key initiatives in their local markets.

- Jennifer Green, California Center for Sustainable Energy, discussed CCSE's TOP HVAC training program
- Emily Levin, Vermont Energy Investment Corporation, discussed Efficiency Vermont's efforts to characterize the market and apply this knowledge to their overall outreach strategy.
- Lianne Altman, Long Island Power Authority, discussed LIPA's recent efforts to migrate HVAC contractors from their Cool Homes program into HPwES





## *Evolving HPwES – v2 Updates*

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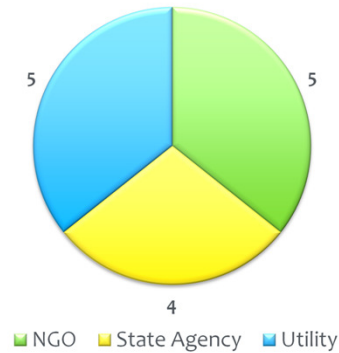
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## Stakeholder Process Update

- Close of Public Comment Period: May 31, 2012
- Number of comments received: 664
- Number of stakeholders responding: 50
- 41% of comments were from current HPwES Sponsors

Responding HPwES Sponsors by Type

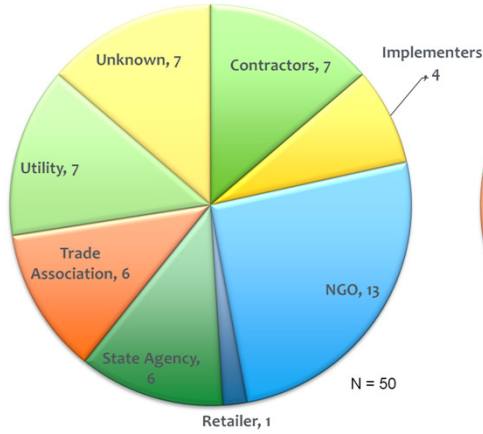


Review of stakeholder comments received on the proposed v2:

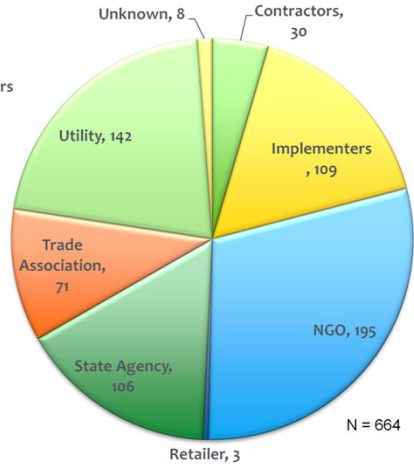
- Since many comments were received in memo form, we had to make some judgment calls on how to divide them up into individual topic areas.
- Comments ranged from very specific technical details to very broad program design issues.
- Although the majority of comments were received from non-sponsors, several NGO's and Trade Associations provided aggregated responses representative of their membership including many current Sponsor organizations.

# Responses by Constituency

Constituencies Responding



Comments by Constituency



Since the NGO's and Trade Associations tended to submit aggregated comments on behalf of a larger constituency or membership, it is difficult to quantify the weighted relevance of individual comments received. However, there was a good spread of representation overall among stakeholders who are already active in the HPwES Program and the home performance industry in general.

## Stakeholder Process Update



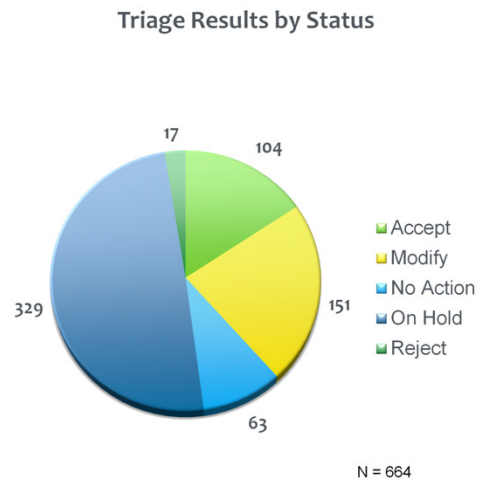
Common stakeholder comment themes include:

- Slow the process down
- Make time to incorporate stakeholder suggestions and respond to current needs
- Don't overcomplicate things
- Prioritize most urgently needed improvements while designing for the future

As a result of a combination of things including stakeholder concerns, and budget uncertainties, we anticipate slowing down many aspects of the v2 transition.

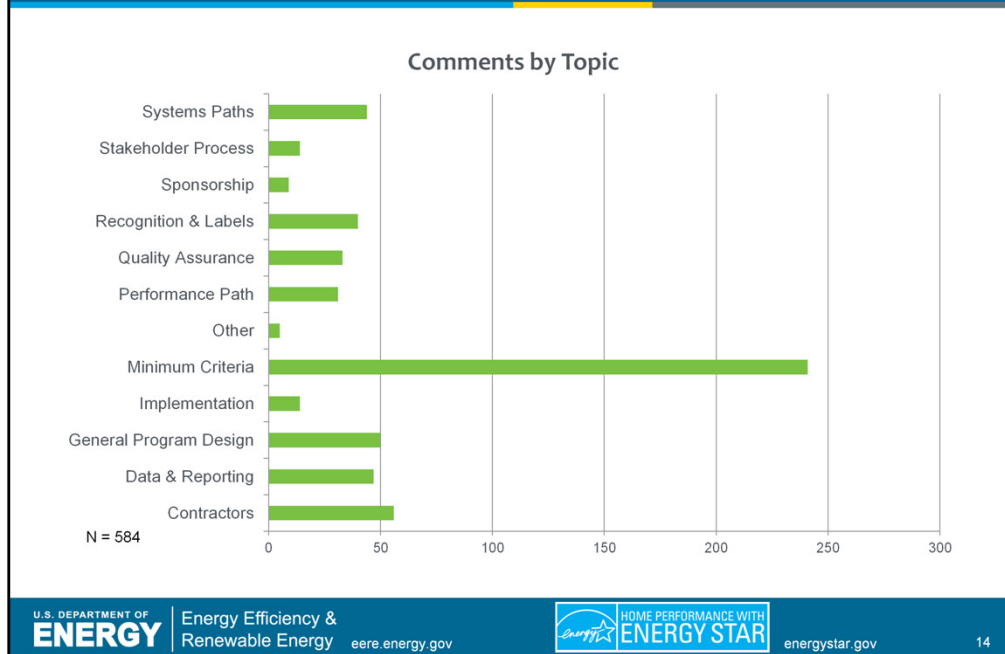
## Results of Preliminary Comment Review

- 38% of comments received were categorized as
  - “accept” or
  - “accept with modifications”
- Half of all comments received are temporarily on hold pending one of the following:
  - Additional stakeholder input
  - Additional research or analysis by HPwES Team
  - Outcomes of predecessor decisions (i.e. “dependent details”)



The majority of comments that ended up with a designation as a “dependent detail” were items that were related to measure-specific technical details proposed in the v2 design. As we focus our efforts on bigger picture decisions, those detailed comments have been deferred until later. One possibility is that those detailed decisions will continue to be left to the Sponsors instead of mandated by DOE, in which case it will not be necessary for DOE to further pursue resolution to these specific comments.

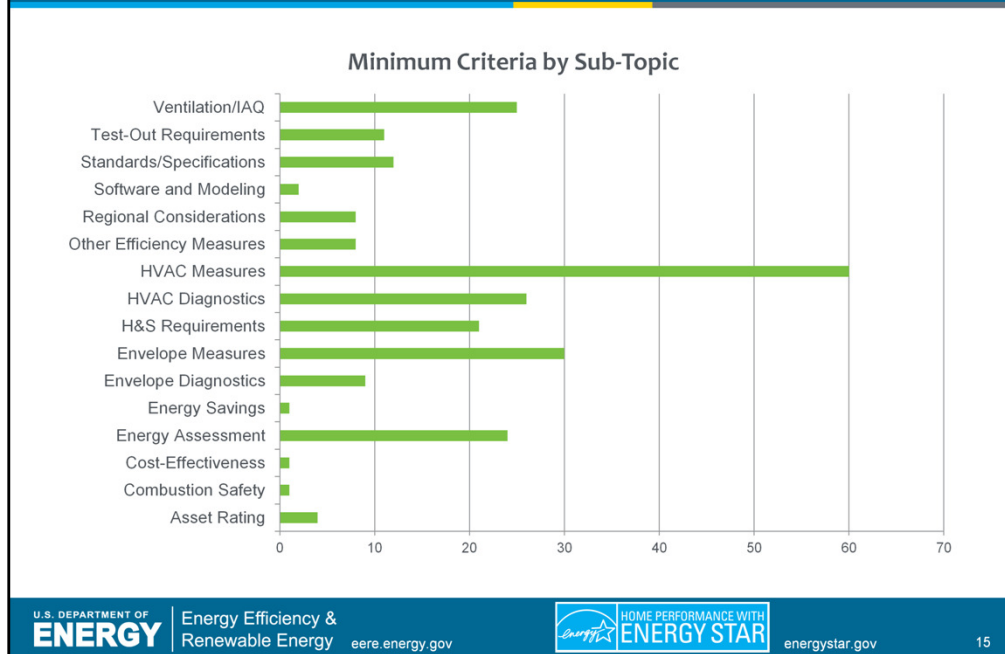
## Comment Summary by Topic Area



Broadly defined topic areas. Each comment was further assigned a sub-topic and detail description to help us identify specific issues and understand trends.

“Minimum Criteria” included all comments related to technical specifications and is shown by sub-topic on the next slide.

## “Minimum Criteria” Sub-Topic Areas



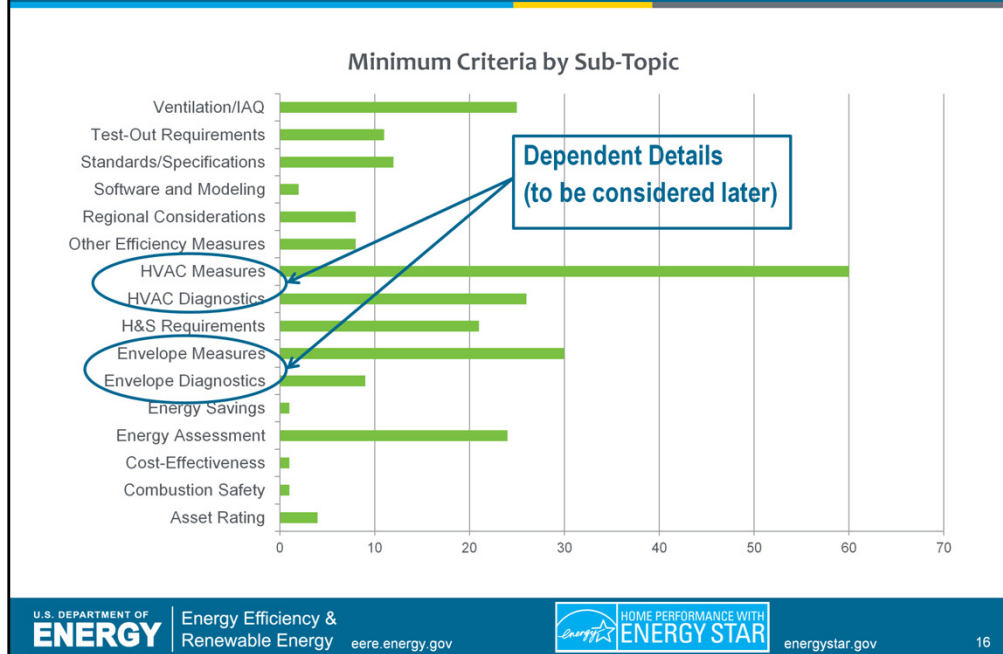
The vast majority of “ventilation/IAQ” comments were related to the application of ASHRAE 62.2 to existing homes including practicality and cost concerns.

Comments regarding “test out requirements” were mostly related to the proposed requirement for IR inspections, which most respondents felt should not be mandatory.

A wide range of comments were received regarding “Energy Assessments” and this feedback will be used to design a minimum assessment criteria for HPwES.

There was confusion among respondents between a minimum criteria and a comprehensive assessment that will be clarified in the next revision.

## “Minimum Criteria” Sub-Topic Areas



The majority of comments in the categories for “diagnostics” and “measures” were directly responding to detailed specifications put forth in the original v2 proposal.

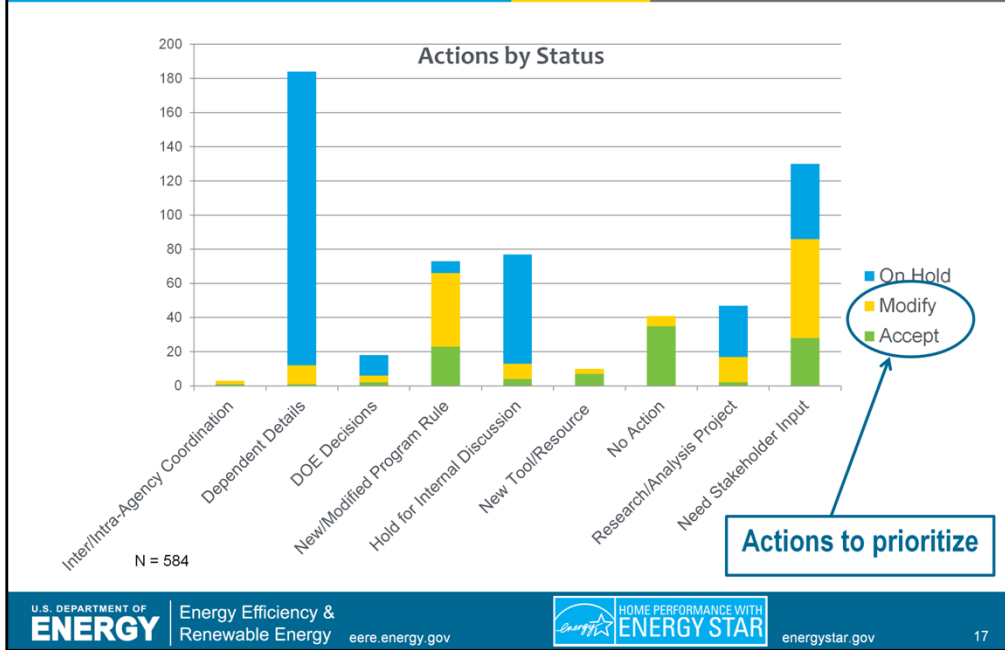
A complete review of these items is on hold pending resolution of some bigger picture design decisions.

For example, if a decision is made that DOE will not mandate individual measure specifications, it will not be necessary to decide which insulation levels, equipment ratings, etc. are required.

Of the 664 comments that were logged, 184 of them fall into this category.





# Results of Preliminary Comment Review




Note that “accept” and “modify” status comments will be prioritized but several other supporting projects will be launched in parallel to get to answers for “on hold” issues as summarized in the following slides.

## Design Elements Requiring More Information

	DOE Decisions	Research/Analysis Projects	Additional Stakeholder Input
	Labeling and branding, recognition and completion certificates	ASHRAE 62.2	Systems paths vs. whole house, measure trade-offs, baseload and DHW measures
	Inter- and Intra-Agency collaboration and coordination	Standardized data collection (HPXML)	Regional considerations, cost-effectiveness, integration with existing programs
	Use of Home Energy Score as asset rating	Performance metrics and evaluation	Costs of implementation



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These are the program elements that will require additional work, conversation, pilot initiatives, etc. before they can be finalized.

The HPwES Team intends to pursue the items listed in the second column in parallel with on-going efforts to enhance delivery of version 1 over the next 6-10 months.

## HPwES Priority Design Elements

- Minimum criteria for a HPwES home energy assessment
- Minimum health and safety requirements
- Minimum performance testing requirements
- “Ineligibility Criteria”
- Quality assurance specifications and requirements



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These are the elements that the HPwES team is working on and stakeholders can expect to see changes coming for sooner rather than later.

We have a team working on it...

## On-Going Process

- 
- Options for Stakeholder Activities
    - Regional meetings (coordinated with other industry events)
    - Topical meetings, conference calls, or webinars
    - One or two focused working sessions
  - Prioritization of Stakeholder Activities
    - Coordinated with evolution of HPwES v1
    - Avoid duplication of efforts
    - Ensure work products are aligned with DOE goals

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Suggested options for on-going stakeholder engagement. DOE/SRA team will continue to pursue short-term objectives in tandem with longer term projects. We are seeking stakeholder feedback on the format(s) that work best for continued collaboration (i.e. large national meetings, small regional meetings, topic-specific working sessions, webinars, on-line collaboration, etc.)

## For more information



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