DOE Technical Assistance Program





Residential Building Audits and Retrofits

Casey Murphy

ICF International

What is TAP?



DOE's Technical Assistance Program (TAP) supports state, local and tribal officials implementing the Energy Efficiency and Conservation Block Grant (EECBG) and the State Energy Program (SEP).

TAP offers tools and resources needed to implement successful and sustainable clean energy programs.



TAP Goals & Objectives



Goal: Provide SEP & EECBG recipients with resources needed to swiftly implement successful and sustainable clean energy programs.

Objectives: To provide proactive assistance, technical expertise, best practices, network expansion, and policy & program development in order to:

- Accelerate grantee's implementation
- Improve program and project performance
- Increase the return on Recovery Act investments
- Increase the sustainability of Recovery Act investments
- Build protracted capacity at the state, local, and tribal level



TAP offers EECBG and SEP recipients:

- One-on-one assistance
- Extensive online resource library (best practices, templates, webinars, project map, events calendar, TAP blog)
- Facilitation of peer exchange of best practices and lessons learned

On topics including:

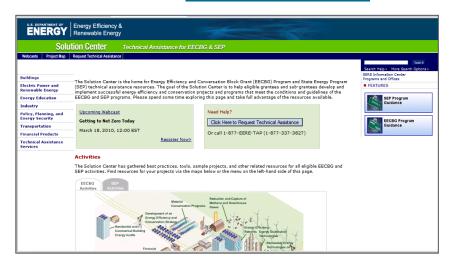
- Energy efficiency and renewable energy technologies
- Program design and implementation
- Financing
- Performance contracting
- State and local capacity building

TAP is DOE's Opportunity to Help You!

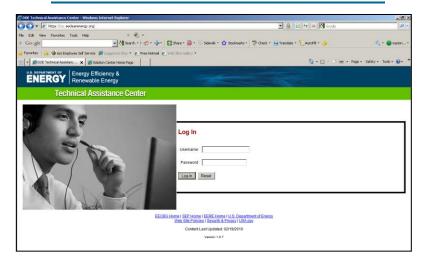


We encourage you to:

1) Explore our online resources via the Solution Center



2) Submit a request via the Technical Assistance Center



3) Ask questions via our call center at 1-877-337-3827 or email us at solutioncenter@ee.doe.gov

Today's Objectives



Have a greater understanding of the local, regional, and national efforts to promote energy efficiency in residential buildings

Have a greater understanding of the programmatic elements of residential building audit and retrofit programs and how those may or may not align with your programs

Learn about additional resources that you can access to address residential retrofit issues and concerns

Outside of the Scope



Address or answer specific programmatic issues about the DOE's EECBG grants – please contact your local regional coordinators

Address new homes or commercial building audits and retrofits

Address renewable energy strategies or programs

Provide specific guidance for designing your programs

Agenda



- About Us
 - Speaker
 - Audience
- Context
 - Importance of residential sector energy use
 - History of addressing energy efficiency
 - Changing environment since 2008 (e.g., ARRA)
- Programmatic needs, frameworks and strategies
- Recent examples
- Resources

About the Speaker



- Owned a framing/remodel company for 15 years
- Participating contractor in Maryland's Home Performance with ENERGY STAR program
- Supported utility programs that promoted energy efficiency goals
- For ICF International, currently supporting EPA programs
 - Home Performance with ENERGY STAR
 - Indoor airPLUS

About the Audience - assumptions



- Most audience members are grantees and have a residential design finalized – working with consultants, as needed
- There are a wide variety of programs that are represented by audience members
 - Audit only programs
 - HERS based approaches
 - Clipboard
 - Other
 - Financing only PACE, unsecured, other
 - Single measure
 - Mix of incentive levels

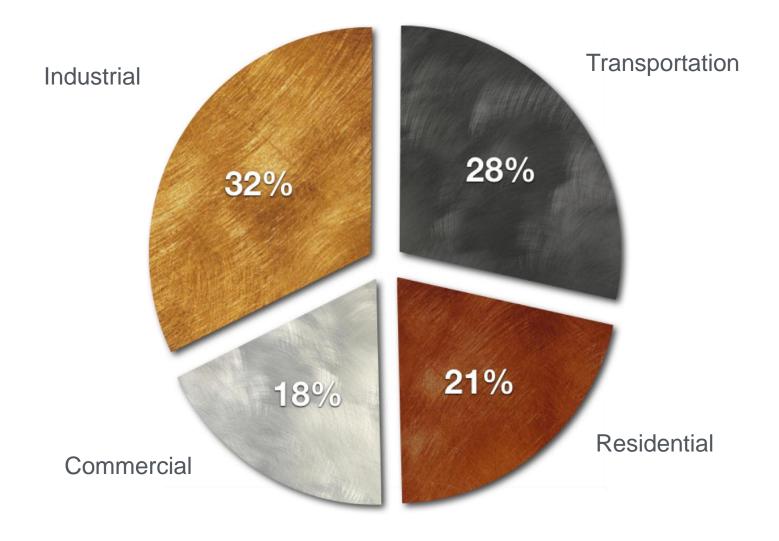


Diverse Goals



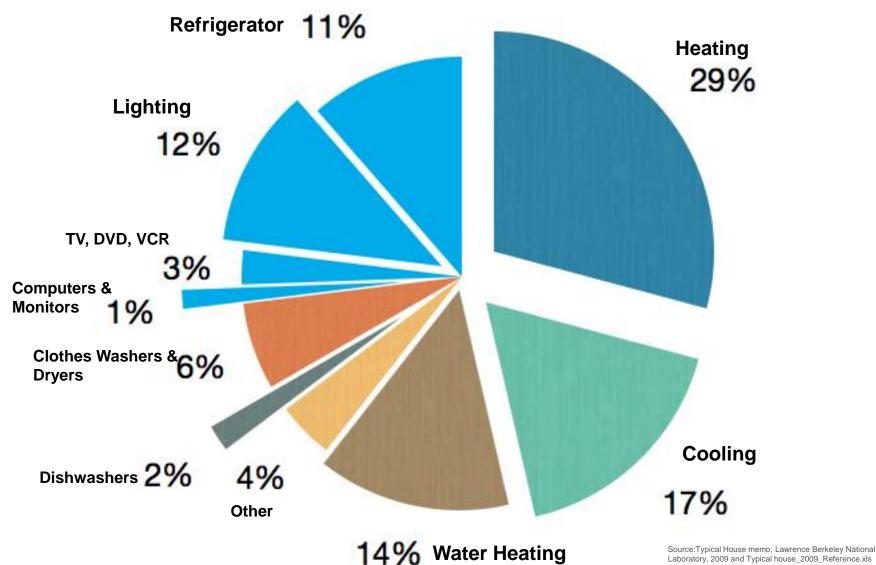
- That energy savings are the primary driving force for participation
 - Jobs
 - Carbon reduction
 - Total energy usage vs. peak load
 - Improving housing stock / tax base
 - Mitigating foreclosure concerns
 - Adding capacity to perform assisted work (weatherization)
 - Contractors, homeowners have even more value propositions

Importance of Residential Sector



Residential Energy Usage





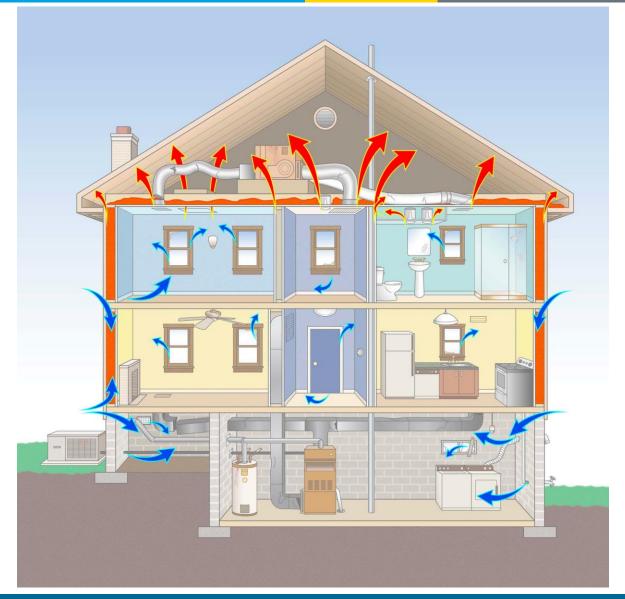
ENERGY STAR Products



- "ENERGY STAR qualified products...and services are more energy efficient than conventional products...and services"
- There are no trade-offs in performance or quality



House-As-A-System





Terminology and Existing Practices



- "Weatherization" DOE program or scope of work?
- "Audits" and "Retrofits" title of today's webinar
- Audits, surveys, assessments, clipboard audits, diagnostic audits, walk-through's, etc.
 - Skills of auditors
 - Protocols
 - Status of auditor
 - Third party?
 - "Contractors"?
 - Sales person / facilitator / "energy advocate"?

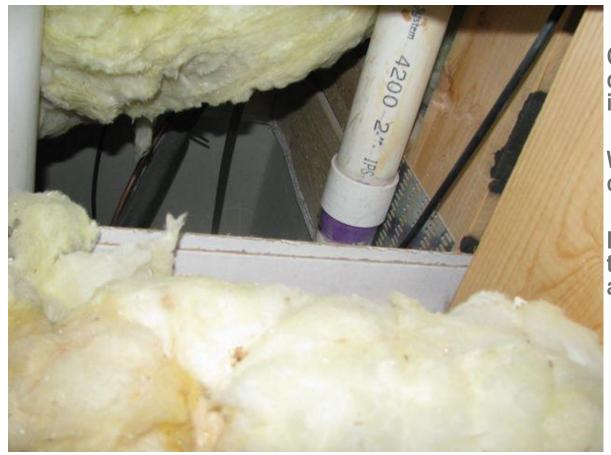








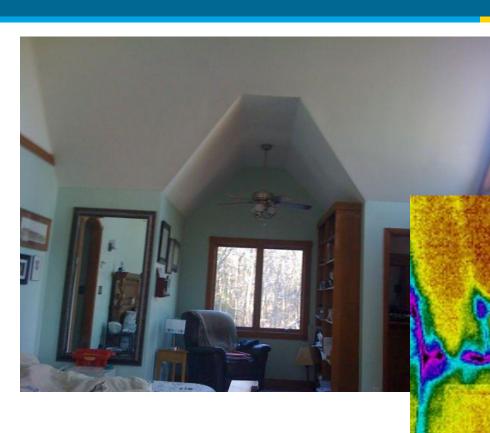
Can we rely on existing trades to provide "retrofits"?



Can you see this if you didn't pull up the insulation?

Will a walk-through audit catch this?

How do you confirm that this has been addressed after the work is complete?

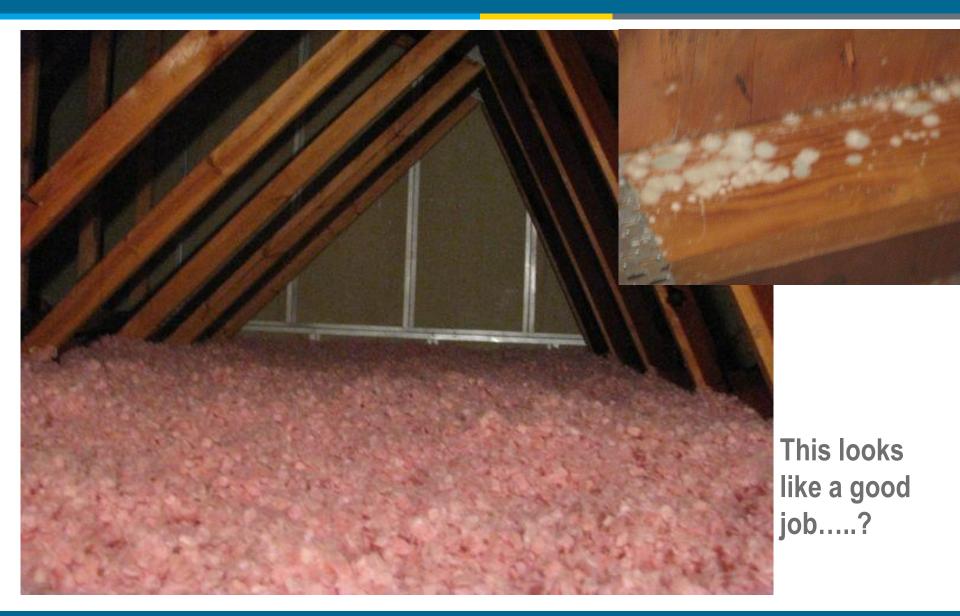


Do you need diagnostics – infrared camera?

67.5

55.0

70.6 °F











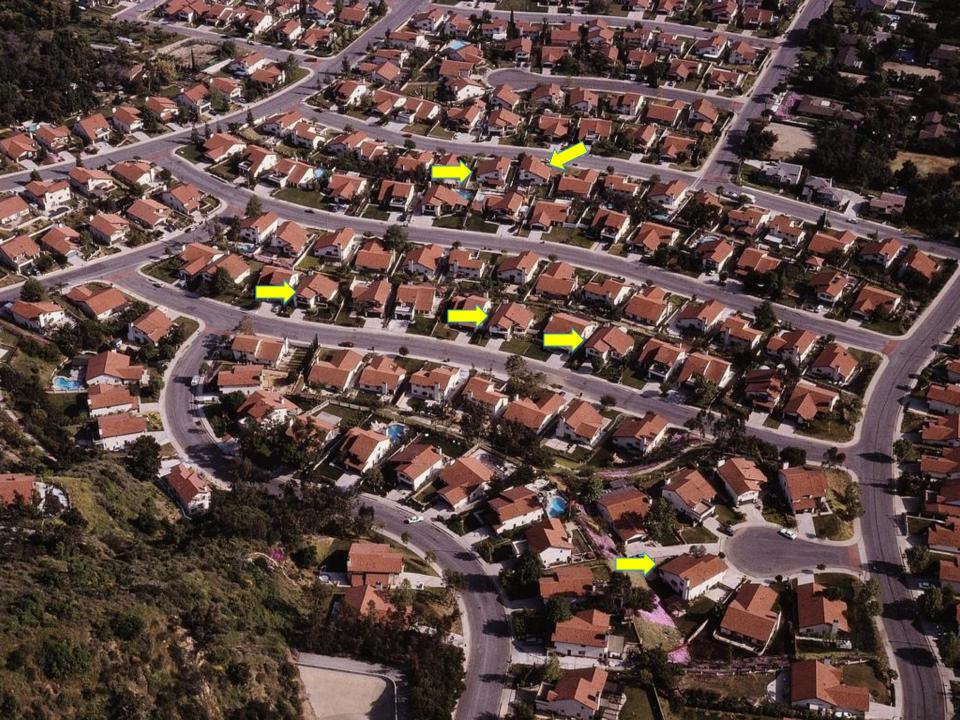






1200 ppm of carbon monoxide



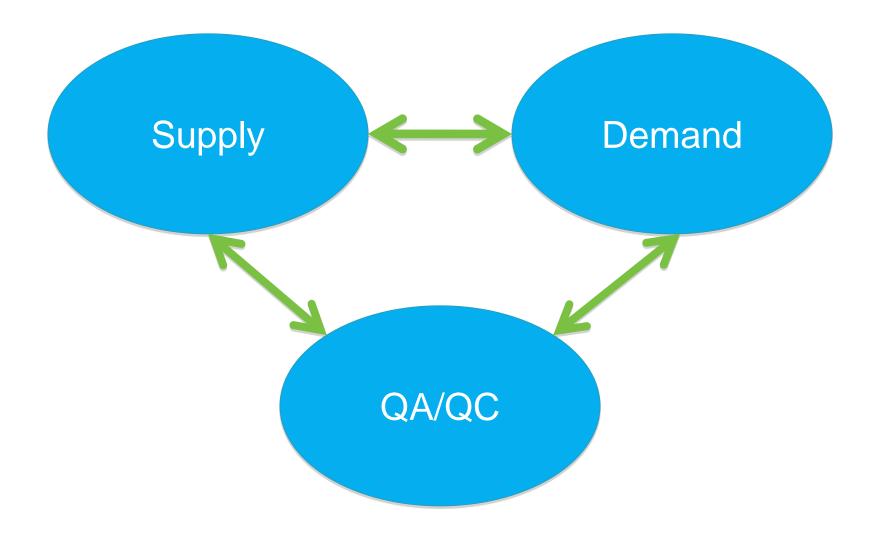




Let's ask these questions again....



- Audits, surveys, assessments, clipboard audits, diagnostic audits, walk-through's, etc.
 - Skills of auditors
 - Protocols
 - Status of auditor
 - Third party?
 - "Contractors"?
 - Sales person / facilitator / "energy advocate"?
- How do we verify and report QUALITY jobs for the homeowner's sake and the program's sake?





Supply

- Identify, recruit, train, certify, mentor participants
- Create training standards / define qualifications for program participation
- Enable companies to differentiate themselves in the marketplace
- Give them tools and resources to be profitable





Demand

- Educate homeowners about energy usage, the program, and the process
- Identify and overcome barriers to purchase
 - Cost of initial audit
 - Lower total costs via rebates
 - Enable homeowners to finance cost-effective solutions



Quality

- Provide tools and training to do good work
 - Software
 - Forms, processes that work for the participants
- Trust but verify
 - Strong QA for both the homeowners and the company participants





YOUR HOME CONTRIBUTES TO THE QUALITY OF THE ENVIRONMENT

U.S. Environmental Protection Agency . U.S. Department of Energy

About ENERGY STAR - News Room - FAQs - KIDS

Search

Products

Home Improvement

New Homes

Buildings & Plants

Partner Resources

Home > Home Improvement > Home Performance with ENERGY STAR

Home Performance with ENERGY STAR

A drafty home, rooms that are too hot or too cold, and high energy bills are all common issues for homeowners. A quality installation of a new heating or air conditioning system, buying replacement windows, or adding more insulation may fix part of the problem. But the way to better results is through an integrated "whole-house" approach that looks at your house as a system.

Home Performance with ENERGY STAR, a national program from the U.S. EPA and U.S. DOE, offers a comprehensive, whole-

Contractors participating in a locally-sponsored Home Performance with ENERGY STAR program can help you cost-effectively improve your home's energy efficiency. These specially-trained contractors evaluate your home using state-of-the-art equipment and recommend comprehensive improvements that will yield the best results.



HOME PERFORMANC WITH ENERGY STAI



Watch Video: A Comprehensive Approach to Home



Read More about What to Expect from Home Performance

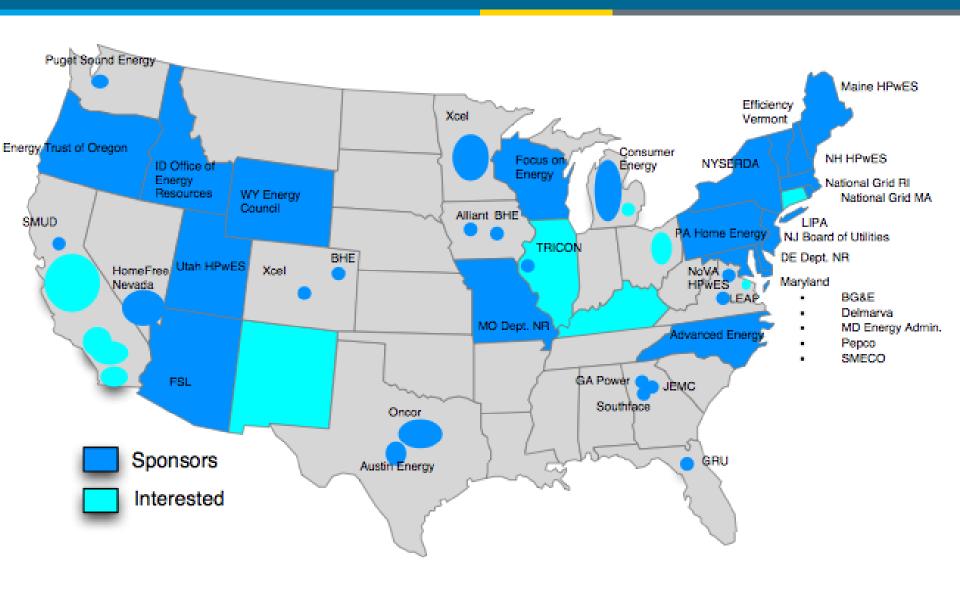


Read Home Performance Stories from Real Families



Home Performance with ENERGY STAR Locations





Recovery Through Retrofit



 Market Barrier 1: Consumers need reliable home retrofitting information to make informed decisions

 Market Barrier 2: The costs of home retrofit projects are beyond the average homeowner's budget

 Market Barrier 3: Increase the number of skilled workers and green entrepreneurs to successfully expand efficiency retrofit programs on a national- scale

Recovery
Through
Retrofit
OCTOBER 2009

MIDDLE CLASS TASK FORCE
COUNCIL ON ENVIRONMENTAL QUALITY

Recovery Through Retrofit and HPwES



BARRIERS

Access to Information:

Consumers do not have access to straightforward and reliable information.

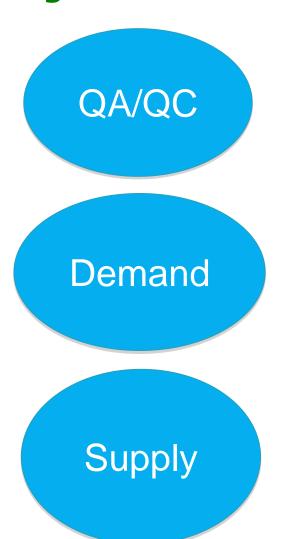
Access to Financing:

Homeowners face high upfront costs and are often unable to recoup the value of their investment.

Access to Skilled Workforce:

There is an insufficient amount of skilled workers to expand energy retrofit programs on a national level.

Program Elements



EECBG FOA



- Close to \$400 million total, allocated to 8 20 winners (\$5 to \$75 million each)
- "Fundamentally and permanently transform energy markets..."
- "Comprehensive community-scale energy-efficiency approaches..."
- "Leverage...multiple local jurisdictions"
- FOA issued "in conjunction with Recovery Through Retrofit" – and announced a few days afterwards

REEP



- Retrofit for Energy and Environmental Performance
 - Replace current tax credits still have prescriptive element
 - \$3,000 for demonstrated 20% reduction, \$1,000 for each 5% improvement (e.g., 30% = \$5,000). Up to 50% of retrofit costs.
 - Rely on EPA to define contractor standards (e.g., BPI)
 - Rely on establishment of national standard for software development (BESTEST-EX)
 - Passed House, in Senate. While REEP has bipartisan support, current legislative vehicle does not (cap and trade).

Home Star



- Passed the House, Senate may consider in September
- Two levels:
 - Silver Star prescriptive measures up to \$3,000
 - Gold Star performance based \$3,000 for 20% reduction, a 50% reduction could result in \$8,000
- Could have financing component
- QA/QC similar to HPwES

NYSERDA » Program Elements



Contractor Training and Requirements

- BPI Building Analyst Certification
- BPI Home Performance Contractor Accreditation
- Completion of 24 jobs, or \$180,000 in work, each year beginning in second year
- Utilize local community college for training

Marketing

- TV, cable, and print advertising
- Successful co-op advertising program
- Regional and local specific marketing
- Cross promotion with other NYSERDA programs, marketing of ENERGY STAR brand

Incentives

- Homeowners:
 - ENERGY STAR Financing: unsecured loan up to \$20,000 (terms of 3, 5, 7 or 10 years); available to owner-occupied 1- or 2-family homes. (NYSERDA buys down the interest rate of the loan.)

OR

- 10% of the cost of eligible energy efficiency improvements, up to a maximum incentive of \$3,000,
- Contractors:
 - Reimbursements on training and equipment
 - Free TREAT software
 - Early buy-in cash incentive
 - 5% rebate for reporting audit
 - 2% bonus up to \$400 for referrals to other BPI contractors
 - Cash awards ranging from \$25 to \$130 for every installed eligible ENERGY STAR product

Utah Home Performance







Residential Retrofits Yield Substantial Savings

Utah Home Performance with ENERGY STAR offers a comprehensive, whole-house approach to home improvement that results in better energy efficiency, greater comfort and lower energy bills. Specially trained analysts visit your home to perform an energy assessment and provide a customized energy- and cost-saving action plan, comparing what you pay now to what you could be paying when your home runs at peak performance. If you choose to make energy efficiency improvements using a Utah Home Performance contractor you may qualify for cash back on a percentage of the job cost, in addition to utility rebates and tax credits!



Learn more about our program, how it works, and what an energy audit entails here.











Utah Home Performance with ENERGY STAR ® is funded by the US Dept of Energy and administered by the Utah State Energy Program

Copyright © 2010 – Utah State Energy Program

- Covers 50-80% of energyefficient home improvement costs
- Target a 20% reduction in energy usage per home
- Estimates 2800
 assessments with 750

 improvements
- \$100 entry point NO FREE AUDITS!!

California Story so far...



- •\$110M via CPUC for Investor Owned Utility programs.
- •Currently CPUC has approved approximately \$20M for performance-based (HPwES) retrofit IOU programs and pending approval for approximately \$90M prescriptive retrofit programs. [Statewide Prescriptive Whole House Retrofit Program (PWHRP) Program Implementation Plan filed January 29, 2010 by PG&E on behalf of the IOUs in PG&E Advice Letter 3087-G/3008-E.]

CPUC Program targets for improved homes for investor owned utilities*

	2010	2011	2012
PG&E	3,900-5,700	5,400-8,400	6,200-9,200
SCE	3,000-4,100	4,100-5,800	4,700-6,600
SCG	1,700-2,700	2,400-3,700	2,800-4,300
SDG&E	900-1,690	1,300-2,400	1,400-2,700
Statewide Totals	9,500-14,200	13,200-20,300	15,100-22,800

^{*}Source Prescriptive Whole House Retrofit Program Webinar, Feb 9, 2010

California Story so far...



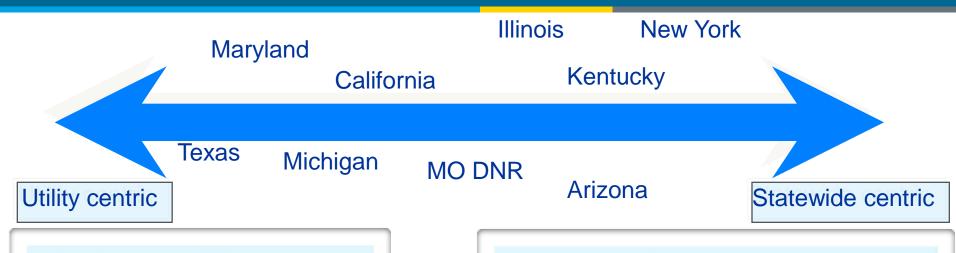
ARRA SEP Funding

- California Comprehensive Retrofit Program launching 2010
 - \$20M Sacramento Municipal Utility District includes HPwES program
 - \$16M Regional Council of Rural Counties
 - •\$11M Association of Bay Area Governments
 - •\$3M The SF Mayor's Office of Housing
- CaliforniaFirst: Municipal Financing for EE and RE residential improvements
 - The <u>CaliforniaFIRST</u> Program is anticipated to launch with a pilot group of jurisdictions, consistir of 14 counties and up to 146 cities
 - \$16M Sacramento County
 - •\$5M City of LA
 - •\$4M County of Humboldt
 - •\$3M City of Sonoma
 - •\$2M City and County of SF
- •\$30M Municipal and Commercial Retrofit Programs



Emerging Models – leverage and sustainability

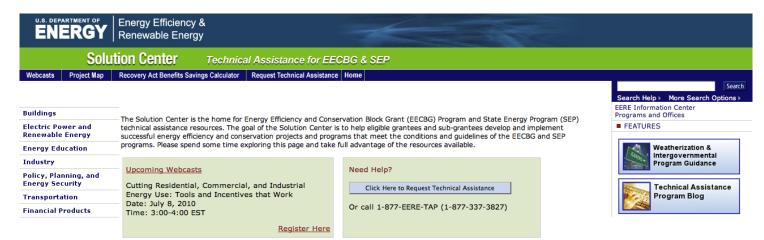




- Experience running DSM programs
- Consistent touch points with customers
- Historically high level of satisfaction with customers
- More consistent funding stream
- More sophisticated IT backend infrastructure
- Access to utility billing data
- Lead market actor in Advanced Metering Initiatives
- Established relationship with trade contractors

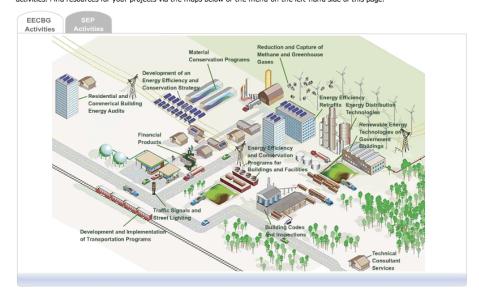
- Avoid duplicate infrastructure
 - common software
 - consistent QA protocols
 - consistent methodology to calculate energy savings
- Fuel neutral
- Aggregated contractor/auditor base
 - standard requirements insurance, certifications, protocols
 - common listing on website
- More seamless homeowner experience
 - Unified website
 - Consistent branding / messaging
 - Financing

Resources from DOE



Activities

The Solution Center has gathered best practices, tools, sample projects, and other related resources for all eligible EECBG and SEP activities. Find resources for your projects via the maps below or the menu on the left-hand side of this page.

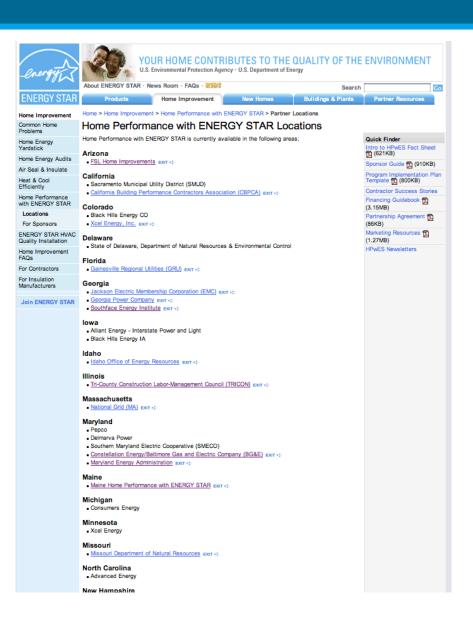


Resources from National HPwES Program **ENERGY**



Resources from Local Stakeholders





homeperformance@energystar.gov

Resources from Local Stakeholders, cont.



Building Performance Institute www.bpi.org





RESNET www.resnet.us

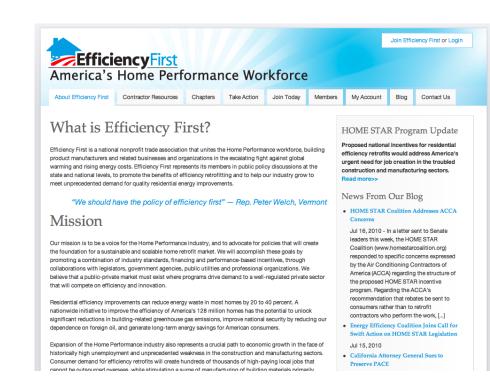
Resources from Local Stakeholders, cont.



Home Performance Resource Center www.hprcenter.org

- Best Practices Committees
 - Nine case studies analyzing successful program
 - Best Practices White Paper
 - •Finance and Incentives Recommendations
 - Marketing Recommendations
 - •Workforce Development Recommendations
 - Business Model Recommendations

Efficiency First www.efficiencyfirst.org



Today's Objectives



Have a greater understanding of the local, regional, and national efforts to promote energy efficiency in residential buildings

Have a greater understanding of the programmatic elements of residential building audit and retrofit programs and how those may or may not align with your programs

Learn about additional resources that you can access to address residential retrofit issues and concerns



Casey Murphy
ICF International
240-375-2311

caseymurphy@icfi.com

Additional Resources



Information and resources from this webinar can be found using the links below. The PowerPoint from the webinar will be posted on the DOE Solution Center at: http://www1.eere.energy.gov/wip/solutioncenter/webcasts/default.html

•ENERGY STAR Web site for homeowners: http://www.energystar.gov/index.cfm?c=home_improvement.hm improvement index

•ENERGY STAR Web site to develop or support a local program http://www.energystar.gov/index.cfm?c=home_improvement.hpwes_sponsors_develop

•DOE Solution Center: www.eere.energy.gov/wip/solutioncenter

•DOE Technical Assistance Center: https://tac.eecleanenergy.org/

•Home Performance Research Council – best practices on financing, marketing, workforce development, business models, and other topics. Case studies are included: http://www.hprcenter.org/

Give Us Your Feedback!



http://www.surveymonkey.com/s/audits