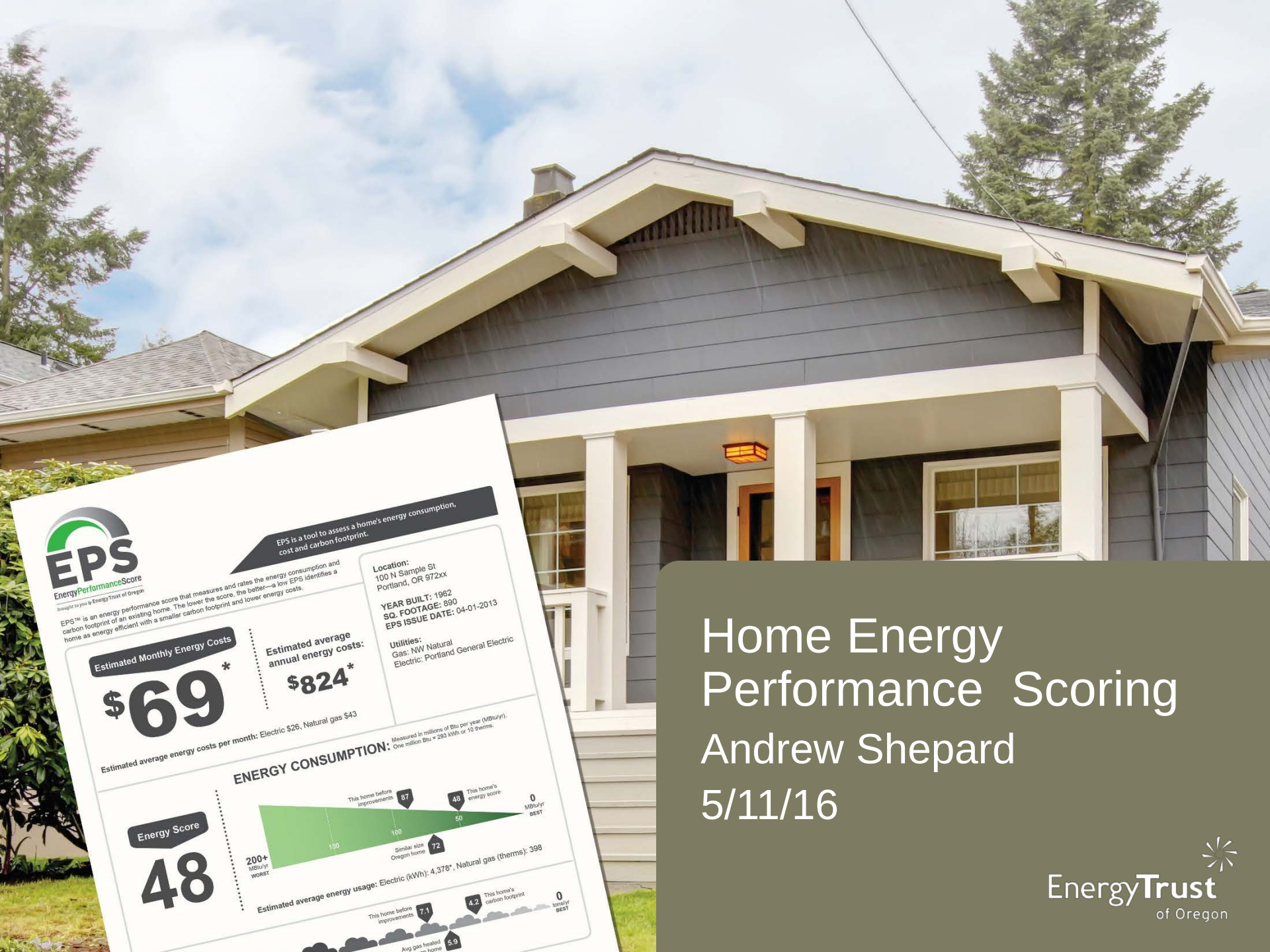


Home Energy Performance Scoring

Andrew Shepard

5/11/16

EnergyTrust of Oregon

Home Energy Performance Scoring and Disclosure

Agenda

- Brief background of Energy Trust efforts
- Provide catalog of market forces and factors influencing Energy Trust efforts and strategy
- Outline Energy Trust home energy scoring proposed direction
- Questions

Complex topic

Is home energy scoring…

- For utility efficiency programs?
- Market driven effort, primarily for the real estate industry?
- For comparing against code?
- To display code compliance?
- Used to compare homes?
- For showing the impact of improvements?
- Validate efficiency for home valuation?
- Used to obtain a special mortgage?
- Mandated metric similar to MPG for cars?
- All of these?

Many stakeholders with varying priorities

- Utilities and Programs
- Governance & regulatory bodies
- Builders
- Remodelers
- Real estate professionals; Realtors, Brokers, etc.
- Weatherization contractors
- Verifiers and Raters
- Home Inspectors
- Financial institutions and Lenders
- Appraisers
- and most importantly Home Owners (consumers, renters)

Initial Strategy for EPS for Existing Homes

- Create a tool that could be leveraged through Home Performance with ENERGY STAR
- Used as a customer engagement tool
- Show benefits of home improvements
- Market based tool to drive savings
- A metric that allows all scored homes to be compared

Elements for Consideration

- Programmatic strategy and market relevancy
- New homes vs existing homes
- Purpose of the score and report; how is it used
- Reportable savings vs rating metric
- Local, regional, and national relevance
- Target audience; home owner vs real estate professional
- Scalability

New Vision as defined by the Home Energy Use Information Stakeholder Group

“Standardized Home Energy Performance information is readily available for all homes so that owners, tenants, as well as prospective buyers and tenants can make informed decisions about energy costs and carbon emissions.”

Broader Home Scoring Success Defined

- An attribute meant for ALL homes
- Easy to understand (synonymous to MPG ratings of cars)
- Ubiquitous in the real estate industry
- Information publicly available; MLS, etc.
- Recognized by appraisers
- Provide proof to lenders such that benefits of efficient homes could be reflected in loan options and features
- General public awareness and understanding
- Wide spread adoption

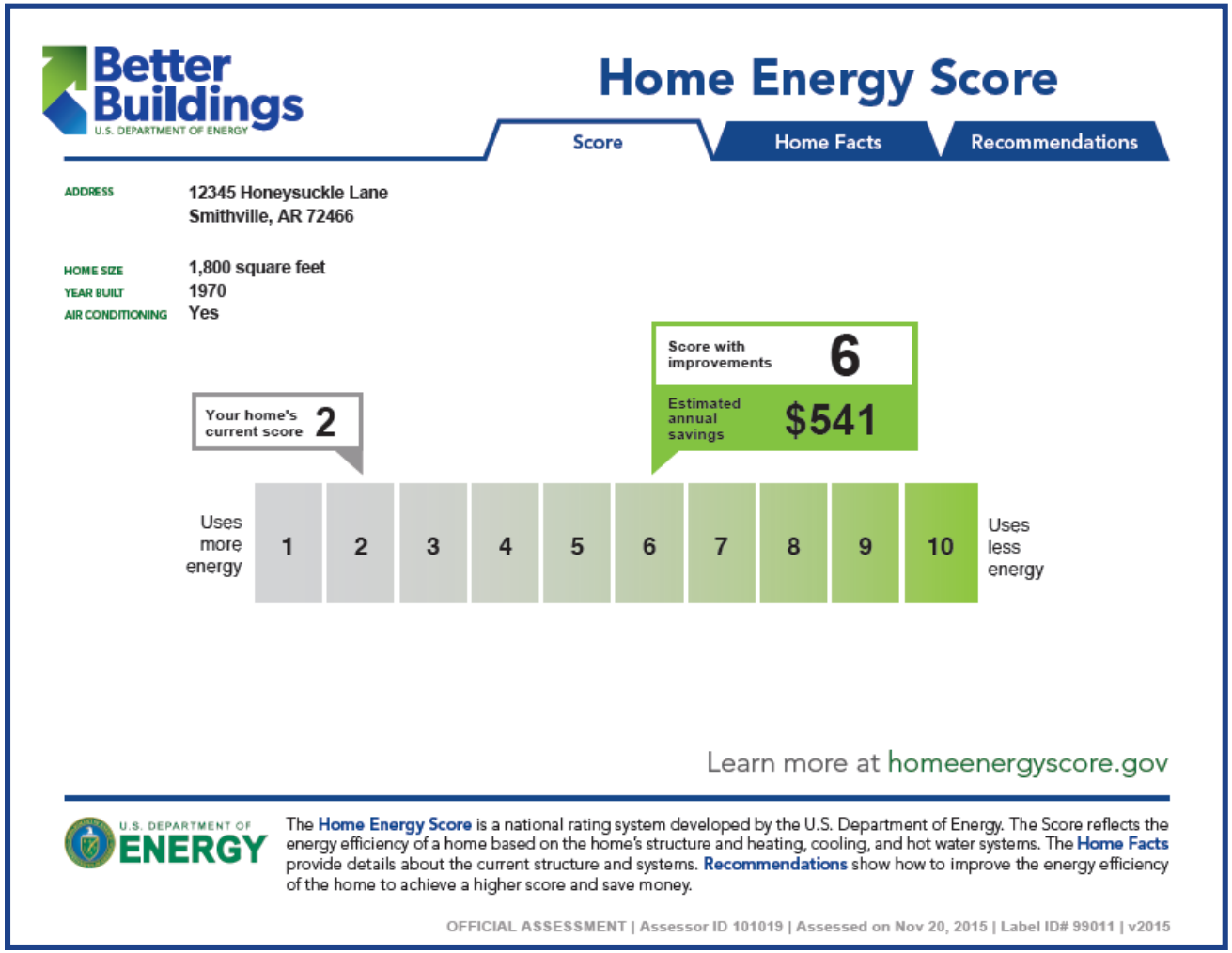
Other shaping forces

- HB2801
- USDOE HES success
- RESNET HERS score
- SAVE ACT
- R/MLS data integration/population
- City of Portland proposed mandate
- Market conditions and engagement
- Broader national Alignment

Conclusion and Suggested Approach

- Energy Trust to sunset EPS for Existing Homes by end of Q2 2017
- Energy Trust to facilitate production of USDOE HES score through CakeSystems API
- New Homes retains EPS brand and methodology for above-code homes.
- No immediate changes are executed for New Homes
- Work with CakeSystems and ODOE to ensure HB2801 compliant HES score sheets

The Score



- Takes an hour or less to complete
- Can be generated by utilities, contractors, home inspectors, others
- On-line tool can be used directly or linked to other software tools
- No reporting requirements, all automated

Next Steps/Future plans

- HB2801 compliance
- Define role of Energy Trust brand on score sheet
- Explore automatic data transfer into publicly available data bases; USDOE Home Energy Information Accelerator
- Research HES accuracy on new NW homes
- Three year national alignment plan

Questions?

*Follow up technical information session to be scheduled at a later date if there are interested parties

Thank You

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