

**Residential Building Energy Labeling Working Group**  
**Meeting Notes**  
**4/9/20**

**Attendees:** Leslie Badger (EVT); Karen Horne (VGS), Kelly Launder (PSD); Chris Gordon (EVT); Melanie Paskevich (NWWVT); Craig Peltier (VHCB); Malcolm Gray (BPPA); Martha Lange (Century 21 Jack Associates); Richard Faesy (EFG); Keith Levenson (PSD); Tim Yandow (CVOEO); Tom Lyle (BED); Mike Russom (BED); Amy McClellan (Milne-Allen Appraisal Company)

- **Review/approve meeting minutes**

- Chris Gordon moved to approve the meeting minutes from 3/12/20, Tom Lyle seconded. Approved by voice vote.

- **Presentation from Scores and Reporting Subcommittee** (*where does the data/information go, who collects and manages it, and is it made public*) (Presentation from Leslie Badger)

Review of Profile:

- Reporting requirements
  - Recommend phased approach. Phase I: single family homes. Tool will use rating data for new construction, and program info from comprehensive w/x programs.
  - Recommend Quarterly reporting.
    - Multiyear projects would be reported quarterly and overwrite data for later quarters/years.
  - Currently data that is entered into Clearly Energy tool is not uploaded to HELIX.
  - Specific data elements uploaded to HELIX should include, but not be limited to:
    - Customer address
    - Name or title of certification or completed project [Assessment Type]
    - Score or rating associated with the Assessment Type
    - Version of the Assessment Type if applicable (used to identify requirements)
    - Date of project completion
    - Annual claimed energy savings if available
    - Annual claimed energy cost savings if available
    - Annual estimated energy use if available
    - Annual estimated energy cost if available
    - Estimated percent fuel reduction if available
  - Richard – would projects being done outside of programs be reported/included, are they included in the PSD Building Efficiency report? Kelly - No they aren't included. But have discussed if a contractor could input data for a customer and then it would be labeled as professionally completed.
- System for maintaining scores/information
  - Richard - How would the state/others have access to the data in HELIX? Leslie – EVT has paid for membership into HELIX for this year. Long-term would need to discuss what the costs would be and who would pay.
  - Where is funding coming from? What happens if HELIX goes away, or NEEP goes away? Who pays for upkeep? Craig: Is there one statewide fee for HELIX? Leslie: yes. Tom: all EVT funding up to now? Chris G: yes. Leslie: We're in an ongoing conversation with NEEP on that.

- Tom – BED would like to be kept in the loop on what the ongoing costs might be
- Public accessibility to data/Privacy
  - HELIX access / protocols with respect to data: Asset based data would be public. Any actual fuel usage is not stored in HELIX. Clearly Energy tool is accessible by anyone. After 30-day lock, could anyone see what homeowner has entered? Tom: nonstarter if public can get access to personal data. It's got to be anonymized. Leslie: Only way PII is accessible is if customer has put in actual energy use data. Suggesting that data does not get stored once label is generated - only the label. Richard: Need to flag this as an issue for Veronique (Clearly Energy)
  - Martha: SPIR has utility info and says that this is public information. We save it for years in case the home gets sold again. Not as worried about privacy issue if people are aware it's public. Leslie: would that hinder people from completing? Martha: we have it in SPIR regardless, so no. We advise homeowners if not required and if you don't know, don't guess. People rarely have a problem with it. Only time is when it is an estate sale or foreclosure. Leslie: utility would not be providing this, just homeowner, right? Tom: I guess so. MF is different if included in the rent.
  - Question of adding caveat to tool that it would be made public. Chris G: Yes, but wait until info has been inputted. Kelly: would be frustrating to input all this data and find out at end of the process that it will be public. Chris G: good point. Also, you don't have to input actuals to get label.
- Field testing
  - Leslie - Don't think there needs to be any further testing that needs to be completed.
- Appeals process
  - Need to think through what happens if a homeowner knowingly or unknowingly enters erroneous data into the Energy Estimator
  - Richard: what if seller input label is wrong? Leslie: lock on profile lasts 30 days. Then new owner can claim home. Richard: what about technical appeals? Chris G: depends on ordinance or statute.
  - What appeal process is contemplated if ordinance is mandatory? Richard: what if there is deceit? e.g. 92% AFUE reported vs. 75% actual. Kelly: Imagine its the same as disputes regarding the SPIR or other seller provided information.
  - Chris G: doesn't seem like appeals process is needed.
- Overall Administrator, Advisory Board
  - Recommend that Efficiency Vermont act as overall administrator of the program. There are costs, though. EVT/CG will come up with estimate. Chris G: back end interface with HELIX. EVT has agreed to take customer calls.
  - Recommend creating a board to make decisions. "If jurisdictions opt to establish a mandatory labeling program, that jurisdiction shall be responsible for oversight, administration, reporting and compliance enforcement. In a mandatory context Efficiency Vermont will be responsible only for ensuring the data and systems are in place..."
  - EVT would field all calls and forward to Clearly Energy for tool issues, or municipality for ordinance issues.
- Other Discussion
  - Richard: Are WAP projects HPwES certified? They meet all the requirements. Tim Y will look into that.
  - Find out if there are ways to share retroactive project data.
- **Subcommittees updates (Subcommittee Leads)**

- *Labeling Impact Subcommittee* – Report by Richard Faesy
  - Focusing on revamping energy section of the SPIR.
  - Will be sending this out to realtors along with a survey with questions on the impact of disclosure of energy information. For example, whether realtors use the pamphlet that was developed and what the impact of that is. What sort of energy features buyers are interested in. When profile design is ready ask for reaction and impressions on that. VAR has agreed to send out.
  - Hope to send out within the next month.
- *Home Assessor Subcommittee* – Report by Keith Levenson
  - Dependent on feedback from the Label and the Reporting subcommittees.
  - May have been overestimating the time/training needed to “do this”, given the simplicity to the level where homeowners can enter.
  - Richard: big opportunity to train the RE community. Do need to id "professional" so work is not moot. Keith: thought to multiple levels. Home inspectors do need to be licensed. (as of 3 years ago)
- *Label and Rating Tool Subcommittee* – Report by Chris Gordon
  - A number of the requests for changes have been implemented as well as suggestions for the tool.
  - Subcommittee is meeting next week.

**Next Steps:**

Next agenda: Review draft report outline. Home Assessor Subcommittee provide overview of their recommendations for requirements for home assessors and training programs.