Multifamily Guidelines are becoming a Standard!

Thiel Butner, Pando Alliance
Brian Christensen, NORESCO
Rebecca Hudson, EPA
Gayathri Vijayakumar, SWA



Multifamily Guidelines -> Standard

Session Overview:

- Introduction of Speakers & Multifamily Sub-Committee
- Audience Poll
- Background
- Which Guidelines will be in which Standards?
 - Modeling (ANSI 305 − a new MF Standard, but like ANSI 301)
 - Inspections (ANSI 305, Appendix A)
 - Testing (ANSI 380 the same as now, but with MF amendments)
 - Sampling (ANSI 305 or 380, Appendix ___)



Introduction of Speakers

Presenters:

- Thiel Butner, Pando Alliance
- Brian Christensen, NORESCO
- Rebecca Hudson, EPA
- Gayathri Vijayakumar, Steven Winter Associates

Other members of the RESNET Multifamily Sub-Committee: Asa Foss (USGBC), Paul Gay (US Eco-Logic), Bruce Harley, Matthew Root (CLEAResult), Brian Stanfill (MaGrann)



Audience Poll

- How many of you are HERS Raters?
- Been a Rater for 3+ years?
- Work in Multifamily?
- How many of you are aware of the Guidelines for Multifamily Ratings? Used them?
- What do you struggle with most when it comes to MF ratings?



RESNET Guidelines for Multifamily Energy Ratings

These Guidelines were developed by the Residential Energy Services Network (RESNET) and adopted by the RESNET Board of Directors on August 29, 2014

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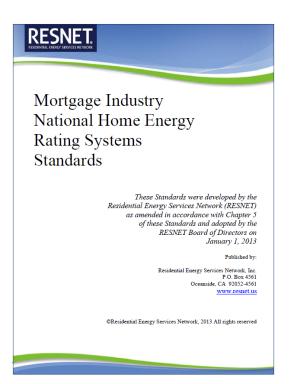
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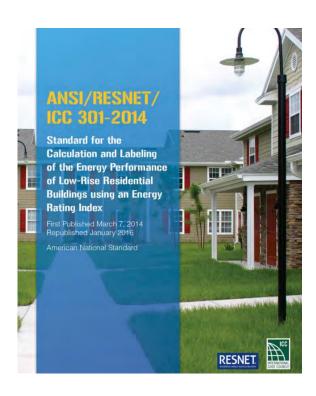


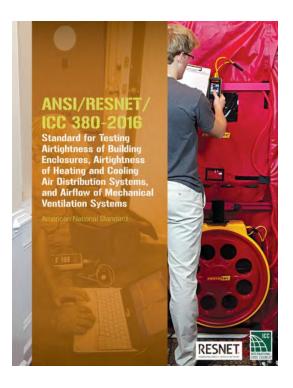
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Background

What Standards do we have that affect all Ratings?



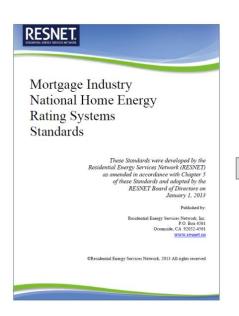


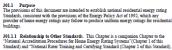




MINHERS Ch 3 -> ANSI 301-2014

Chapter 3 of MINHERS became *ANSI/RESNET/ICC 301-2014* (Standard for the Calculation & Labeling of the Energy Performance using an Energy Rating Index)





GENERAL PROVISIONS

Sandard) and "National Rater Training and Centifying Standard (Chapter 2 of this Sandard) as promulated and maintained by the Residential Energy Services Network (RESNET) and recognized by the mortgage industry.

301.1.2. Relationship to Cattle Law. These Standards specifically recognize the authority of the Cattle Cattle

Chapter Three
RESNET Standards
NATIONAL ENERGY RATING TECHNICAL STANDARDS

303.1.2 Newtonessing to State Law. These standards specifically recognize are distinctly of each state that has a state law or regulation equiting certification, or licensing of home energy rating systems. To the extent that such state laws or regulations differ from these Standards, state law or regulation shall govern.

301.2 Scope

301.2.1 Application of Standards These Standards apply to existing or proposed, site-constructed or manufactured, single- and multi-family residential buildings three stories or less in height excepting hotels and motels.

302 DEFINITIONS AND ACRONYMS

See Appendix B

303 TECHNICAL REQUIREMENTS

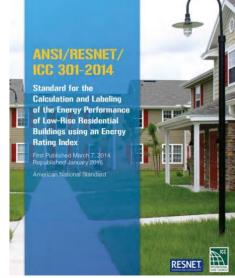
303.1 Rating Procedures

303.1.1 To determine the energy rating of a home, all HERS providers shall-

303.1.1.1 If rating an existing home, visit the home to collect the data needed to calculate the rating.

Chapter Three RESNET Standards

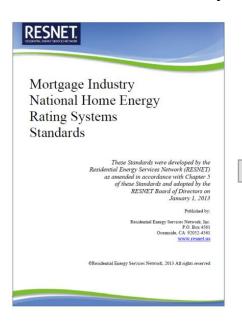


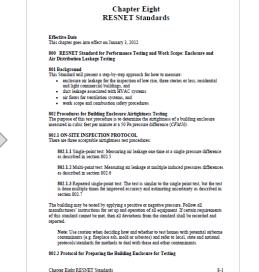


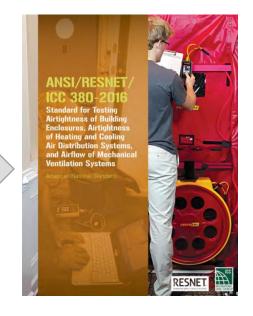


MINHERS Ch 8 -> ANSI 380-2016

Chapter 8 of MINHERS became *ANSI/RESNET/ICC 380-2016* (Standard for Testing Airtightness of Building Enclosures & Air Distribution Systems, and Ventilation Airflow)









What Standards affect all Ratings?

- RESNET Mortgage Industry National HERS Standards (MINHERS)
 - Chapter 6 addresses Sampling
 - Appendix A addresses on-site inspection procedures
 - Move into ANSI/RESNET/ICC 301-2014 is in progress!
- ANSI/RESNET/ICC 301-2014 (old Chapter 3 of MINHERS)
- ANSI/RESNET/ICC 380-2016 (old Chapter 8 of MINHERS)
- So, how do the Guidelines for Multifamily Ratings come into play?
 - Presently, not "Standards", just guidance



Guidelines for Multifamily Ratings

- MF Modeling
 - Provided software workarounds to model HVAC systems and MF situations not seen in single family
- MF Sampling
 - Modified MINHERS Ch. 6



- MF Testing
 - Modified MINHERS Ch. 8
- MF Inspections
 - Modified MINHERS Appendix A





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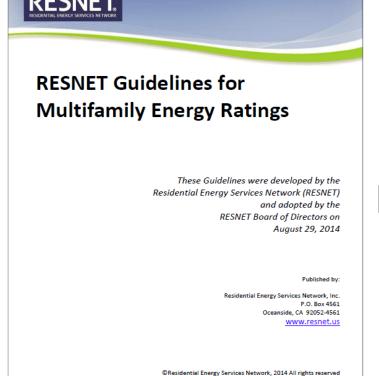
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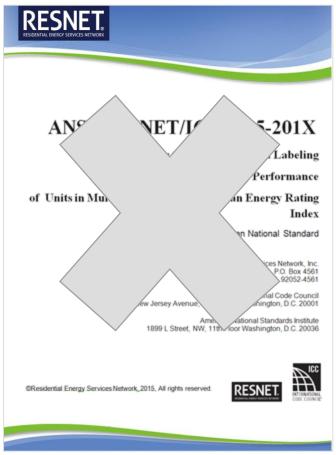
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Guidelines for MF => 1 Standard for MF?



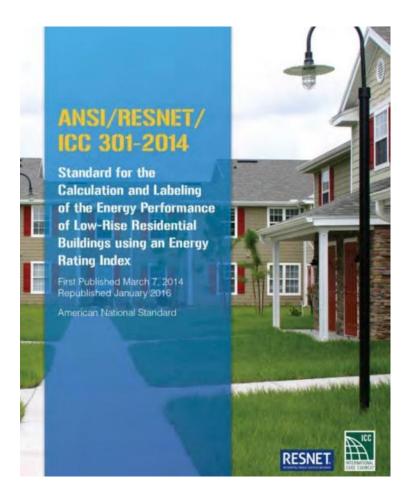


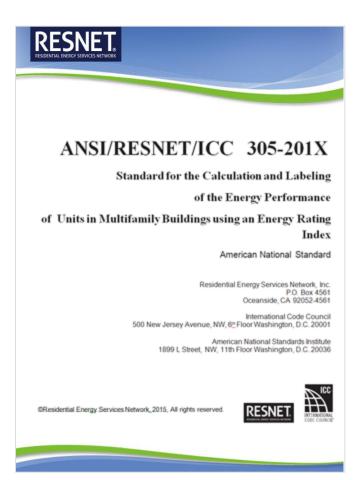






ANSI 301 (SF) & ANSI 305 (MF)







Setting the Standards for Home Energy Efficiency

ANSI 301+MF Guidelines ANSI 305

- MF Modeling
 - Guidelines + ANSI 301 = ANSI 305
- MF Inspections
 - ANSI 305 Appendix A



- MF Sampling for modeling
 - ANSI 305, Section 5
- MF Sampling for testing & inspections
 - ANSI 305 or 380 Appendix



ANSI/RESNET/ICC 305-201X

Standard for the Calculation and Labeling

of the Energy Performance

of Units in Multifamily Buildings using an Energy Rating
Index

American National Standard

Residential Energy Services Network, Inc. P.O. Box 4561 Oceanside CA 92052.4561

International Code Council 500 New Jersey Avenue, NW, 6º Floor Washington, D.C. 20001

> American National Standards Institute 1899 L Street, NW, 11th Floor Washington, D.C. 20036

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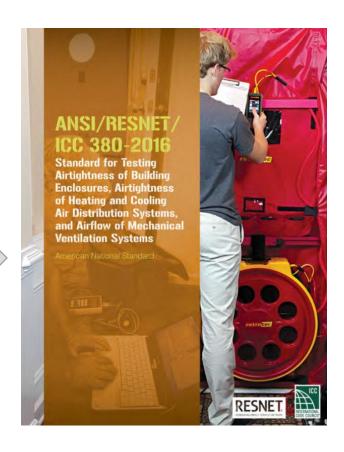






Multifamily Testing ANSI 380

- MF Testing (for ERI & code)
 - Amend ANSI 380 to better address multifamily
 - Blower door
 - Duct blaster
 - Ventilation airflow
 - Additional guidance on MF systems not covered by 380
 - ANSI 305 will reference ANSI 380





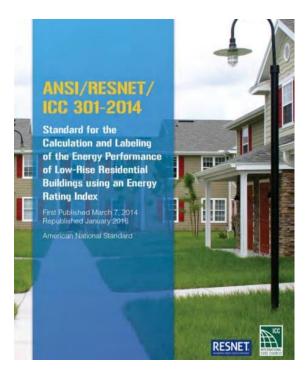
ANSI 301 ANSI 305

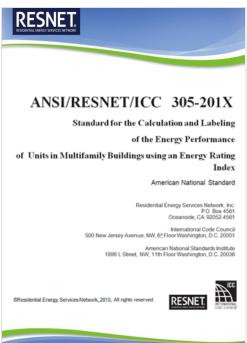
ANSI 380

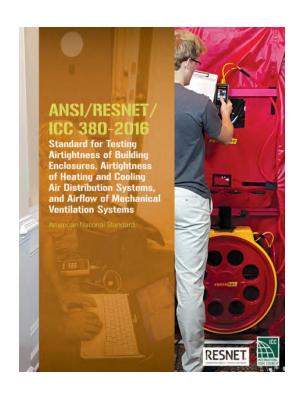
Single Family

Multifamily

All









Setting the Standards for Home Energy Efficiency

Multifamily covered under ANSI 305

- Units in Multifamily buildings of ANY height (woohoo!)
- Dwelling Units AND Sleeping Units (yay!)
 - Current scope of ANSI 301 & MINHERS is limited to "dwelling units". The scope of ANSI 305 will include "sleeping units" which may not have a kitchen or bathroom (ie. student/support housing, but NOT hotels/motels)
- Units NOT Buildings (yay?)
 - Energy ratings only permitted on multifamily units; not buildings.
 - "Building" level ERI approach: the average of all the unit ERIs in a building will be permitted to represent a single ERI for the building



Great! When will these be published?

- ANSI/RESNET/ICC 305-201X & 380-2016 Amendment
 - Summer 2017: Draft to RESNET SDC 300 & Equipment SC
 - Fall 2017: Draft out for Public Comment
 - Spring 2018: Revisions & additional Public Comment
 - Summer 2018: Finalized and published
 - Spring 2019: Proposed for inclusion in the 2021 IECC



Highlights coming in ANSI 305&380

- Modeling (Presented by Brian Christensen)
 - ANSI 305 a new MF Standard, but like ANSI 301
- Inspections (Presented by Gayathri Vijayakumar)
 - ANSI 305, Appendix A
- Testing (Presented by Gayathri Vijayakumar)
 - ANSI 380 this Standard will be revised with a multifamily amendment)
- Sampling for Modeling (Presented by Gayathri Vijayakumar)
 - ANSI 305 Section 5
- Sampling for Testing & Inspections (Presented by Thiel Butner)
 - ANSI 305 or 380, Appendix ____



Modeling



RESNET MF SC Modeling Task Group

Task Group Members:

Brian Christensen (NORESCO)	Troy Maharg (TexEnergy)
Bob Grindrod (CLEAResult)	Brian Stanfill (MaGrann)
Bruce Harley	Gayathri Vijayakumar (SWA)
Joel Williams (TexEnergy)	

- What's new that we'll see in ANSI 305 that wasn't in Guidelines or ANSI 301?
- What's different from Guidelines that we'll see in ANSI 305?



MF HERS frustrations we want to fix:

- Why do apartments get worse HERS than SF homes?
- Why do interior MF units seem to get worse HERS than exterior?

Possible solutions follow...



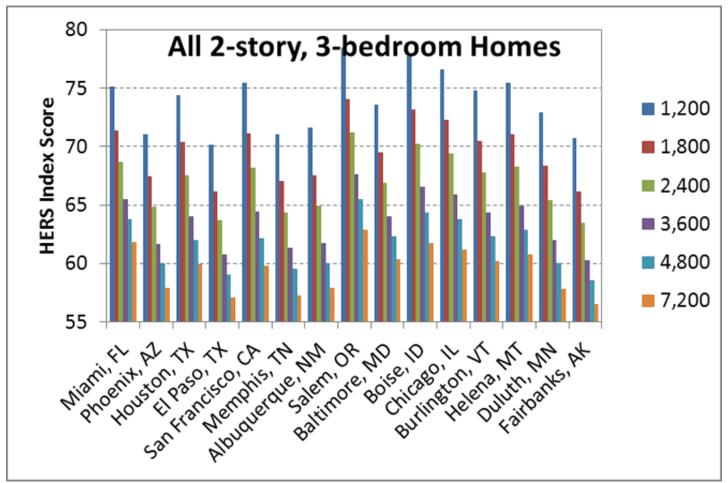
Consider IAF draft Addendum E to ANSI 301-2014

- IAF (Index Adjustment Factor) is pending
 - RESNET webinar early December 2016
- Reduces the HERS bias for large CFA (among other items)
- Big impact on HERS Index for SF and MF homes!
 - Graphical examples next…



Raw HERS Index Scores

(provided courtesy of FSEC)

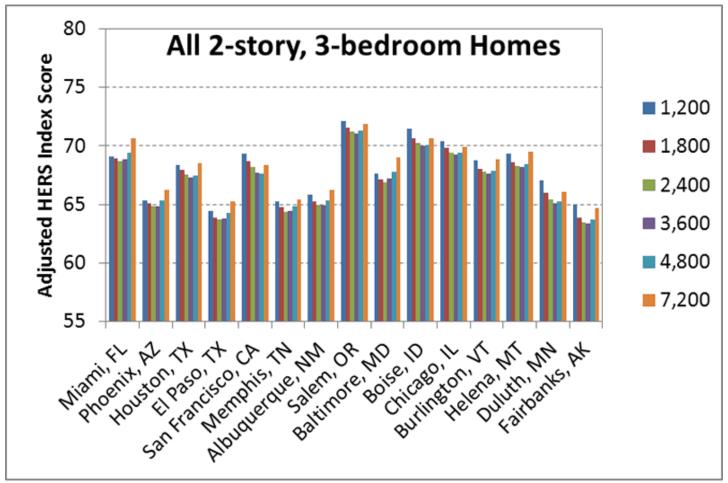






Adjusted HERS Index Scores

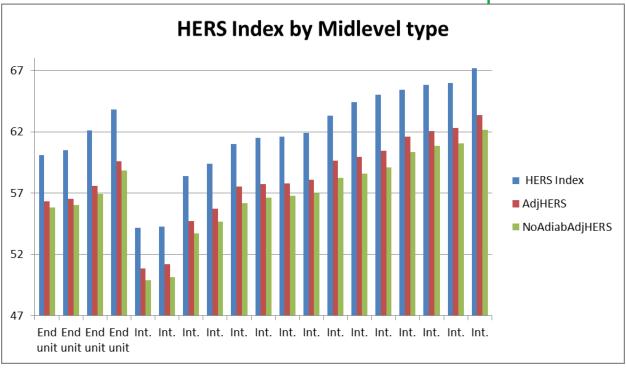
(provided courtesy of FSEC)







Test of IAF, tweaked for MF: reduced HERS 4-6 pts



CFA bias vs SF – Fixed!



Now, consider HERS bias for interior vs exterior units...

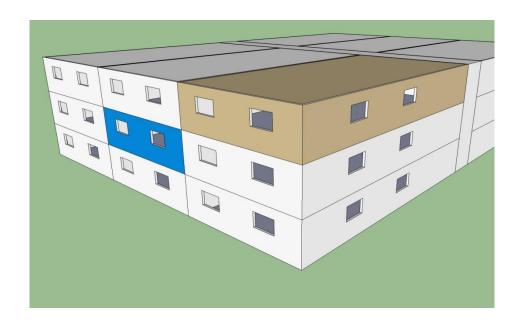
Concept: Infiltration exposure fraction A_{ext}

for units of 1560 sqft:

$$Gold A_{ext} = 0.5$$

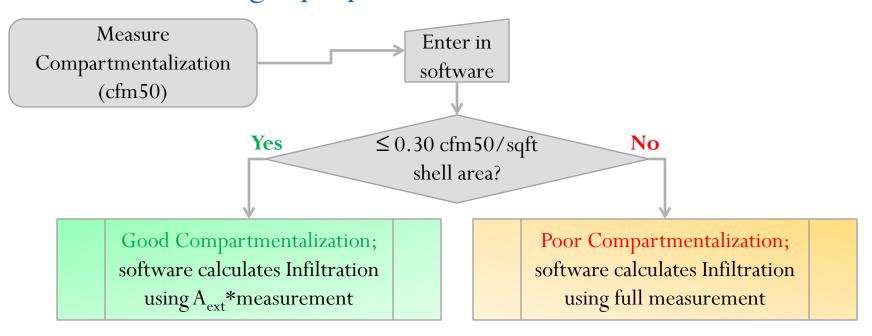
Blue
$$A_{\text{ext}} = 240/4620$$

= 0.05





<u>Infiltration changes proposed for ANSI 305:</u>



This will help reduce HERS bias against interior apartments, which have smaller values of $A_{\rm ext}$.



MF Modeling... Better, Faster, Easier!

Central systems = Complicated in MF Guidelines

- Examples
 - Boiler loop: with radiators, fan coils, or Water-Source HP
 - Chiller loop: with fan coils or WSHP
- ANSI 305: Let the software do the complicated stuff!
 - Make sure the *internal gains* go to the right place
 - Consumption proportional to dwelling unit
 - Standardized ways to represent central systems in software



MF Modeling... Better, Faster, Easier!

Concept:

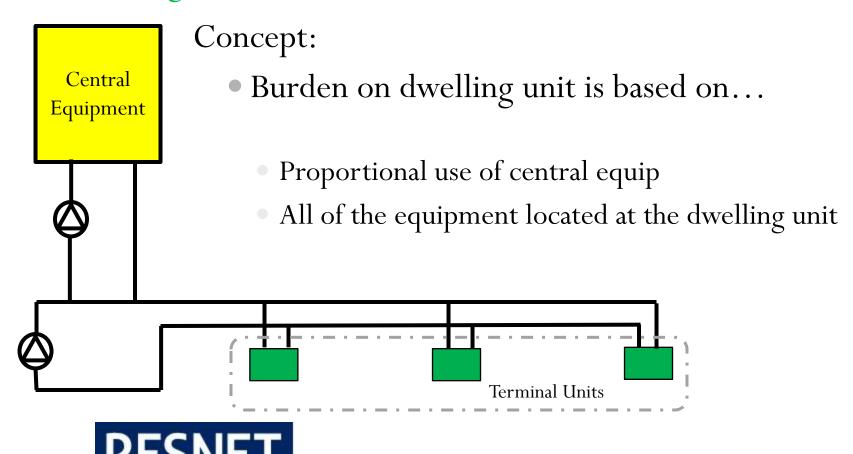
- "Remote Heated Space" is outside of Conditioned Space, and only interacts with the Rated Dwelling via the shared services located within.
- Software shall ensure that heat gains/losses internal to Remote Heated Space are not included in the dwelling unit simulation.

Examples:

- Shared Laundry
- Shared mechanicals

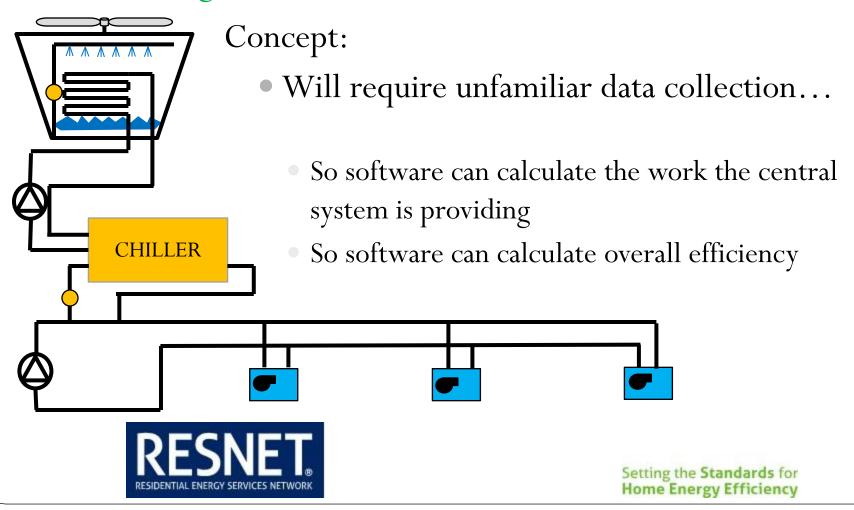


MF Modeling... Better, Faster, Easier!





MF Modeling... Better, Faster, Easier!



MF Modeling... Better, Faster, Easier!

Draft Table of parameters needed for modeling central loop systems

	Central portion:	Boiler loop		Chiller w Cooling Twr		Cooling Twr alone
	Dwelling unit portion:	w fan coil	w WSHP	w fan coil	w WSHP	w WSHP
Prorate:	Total floor area served by central equipment	Χ	X	X	Χ	X
Load & Eff:	Boiler capacity	X	X			
	Boiler efficiency	X	X			
	Chiller capacity			X	X	
	Chiller efficiency			X	X	
	Building Loop circ pump power	X	X	X	X	X
	Boiler primary loop circ pump power	X	X			
	Cooling Tower fan power			X	X	X
	Chiller/Cooling Tower circ pump power			X	X	
	Aux Chiller & Cooling Tower pumps			X	X	X
	Fan coil power (if present)	X		X		
	Total WSHP power (if present)		X		X	X
	WSHP Capacity				X	X
	Auxiliary WSHP power		X		X	X
	WSHP efficiency					X



MF Modeling - Summary

ANSI/RESNET/ICC 305... Better, Faster, Easier!

- HERS bias from CFA going away
- HERS Int. vs Ext. unit bias reduction
 - (by Infiltration reforms within software)
- MF shared systems modeling <u>inputs</u> simplified
 - (software to do the work, not you!)



Next Steps for the Task Group...

Look for more when ANSI 305 goes to public comment! Other modeling areas being worked on:

- Adapting new hot water features from Addendum A
- Separate water heater option for Shared Laundry
- Central Ventilation systems
- Duct leakage impact
- (Others TBD, such as central VRF systems)



Questions?

Next Up: Inspections



RESNET MF SC Inspections Task Group

Task Group Members:

Brian Stanfill	Asa Foss	Paul Gay
(MaGrann)	(USGBC)	(US Eco-Logic)

- What's different from Guidelines and MINHERS and ANSI 301?
- Where will it live?
 - ANSI 305-201X, Appendix A
 - Updated Minimum Rated Features table



On-Site Inspection Procedures

Current location: Appendix A of RESNET MINHERS

• Has not been updated in awhile so it does not currently cover all minimum rated features (e.g. ventilation) and not enough inputs for Multifamily...but is moving to ANSI 301-2014

ON-SITE INSPECTION PROCEDURES FOR MINIMUM RATED FEATURES

Building Element: Foundation				
Rated Feature	Task	On-Site Inspection Protocol		
Conditioning of space	Determine whether a crawl space or basement is unconditioned, indirectly conditioned or directly conditioned	To determine whether a crawl space or basement is conditioned, assess the insulation placement in the walls or floor/ceiling assembly. A vented crawl space is considered unconditioned regardless of the location or existence of insulation. This is because the ambient temperature of the crawl space is close to the outdoor ambient temperature. An unvented crawl space or basement may be considered either unconditioned, indirectly conditioned, or fully conditioned, based on the following criteria: Unconditioned - Foundation walls are not insulated, floor/ceiling assembly is insulated, and any heating or plumbing distribution systems in the space is insulated. The intention in an unconditioned crawl space or basement is to minimize the heating system losses into the space by means of the distribution and plumbing insulation, and to minimize heat flow through the insulated floor/ceiling assembly. Conditioned, indirectly - Foundation walls are not insulated with floor/ceiling assembly insulated and distribution system in the space uninsulated, or foundation walls insulated with floor ceiling assembly insulated or non-insulated and distribution system uninsulated. In an indirectly conditioned crawl space or basement, heating or cooling is unintentionally delivered to the space either through the floor/ceiling assembly or by unintentionally delivered to the space either through the floor/ceiling assembly or by unintentionally		



Appendix A of Guidelines for Multifamily Energy Ratings

- Took MINHERS Appendix, and added inspection protocols for rated features specific to multifamily that are not included in Appendix A of the RESNET MINHERS
- Also added inspection procedures for non rated features for informational purposes



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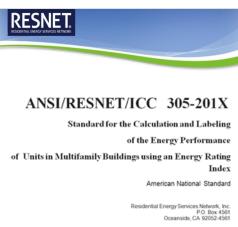


Setting the Standards for Home Energy Efficiency

What's the plan? MF Appendix A within ANSI 305-201X

ON-SITE INSPECTION PROCEDURES FOR MINIMUM RATED FEATURES

Building Element: Foundation			
Rated Feature	Task	On-Site Inspection Protocol	
Conditioning of space	Task Determine whether a crawl space or basement is unconditioned, indirectly conditioned or directly conditioned	On-Site Inspection Protocol To determine whether a crawl space or basement is conditioned, assess the insulation placement in the walls or floor/ceiling assembly. A vented crawl space is considered unconditioned regardless of the location or existence of insulation. This is because the ambient temperature of the crawl space is close to the outdoor ambient temperature. An unvented crawl space or basement may be considered either unconditioned, indirectly conditioned, or fully conditioned, based on the following criteria: Unconditioned -Foundation walls are not insulated, floor/ceiling assembly is insulated, and any heating or plumbing distribution systems in the space is insulated. The intention in an unconditioned crawl space or basement is to minimize the heating system losses into the space by means of the distribution and plumbing insulation, and to minimize heat flow through the insulated floor/ceiling assembly. Conditioned, indirectly -Foundation walls are not insulated with floor/ceiling assembly insulated and distribution system in the space uninsulated, or foundation walls insulated with floor ceiling assembly insulated and distribution system uninsulated. In an indirectly conditioned crawl space or basement, heating or cooling is unintentionally	



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- What's in Guidelines that will go into ANSI 305?
 - Procedure for data collection of centralized boiler and chiller systems, domestic hot water systems, and ventilation systems
 - Inspection procedure for verifying roof deck insulation
 - Protocol on how to determine whether or not ceiling plenum above garages is conditioned space or not
 - ...and others...



- What additional procedures will go into ANSI 305?
 - Procedure for data collection of central VRF systems
 - Procedure for inspecting centralized hot water distribution systems
 - Inspection protocol for common area laundry equipment



Next Steps for the Task Group...

- Coordinating with modeling task group to add inspection procedures as rated features get added to ANSI 305
- Coordinating with Envelopes Sub-Committee on their Appendix A for ANSI 301-2014
- Creating the Appendix A for ANSI 305 by Summer 2017



Questions?

Next Up: Testing



RESNET MF SC Testing Task Group

Task Group members:

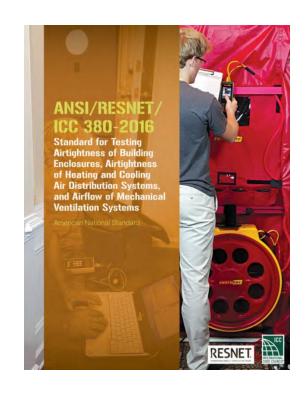
Thiel Butner (Pando Alliance)	Chris McTaggart (The BER)
Asa Foss (USGBC)	Gary Nelson (TEC)
Bruce Harley	Matt Root (CLEAResult)

- Which Testing Guidelines are going into ANSI 380?
- Do they need to be modified?



Which MF Guidelines go in ANSI 380?

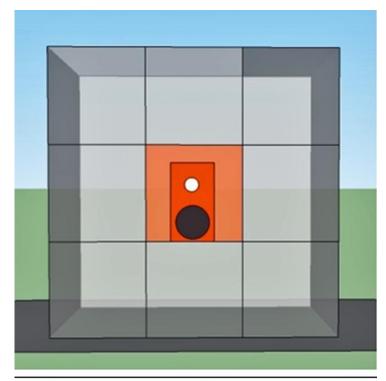
- MF Testing procedures that address:
 - Blower door testing
 - Duct blaster testing
 - Ventilation airflow testing
- MF Testing procedures that are:
 - Not HERS/ERI specific
 - Simple, even if it offers less flexibility





What Worked in the Guidelines?

- Compartmentalization Test
- Defined unit volume/area
- Leveraged RESNET protocols (now ANSI 380)
- Allow testing with central ventilation running



Compartmentalization testing



What did NOT work in the Guidelines?

- Too complex
- Burdensome
- Too much flexibility
 - 4 test options





The End Result?

- Mostly follow ANSI 380
 - Some concerns, but not our Task Group's purview to change
- Add two options for Multifamily
 - Unit Compartmentalization test
 - Full building single zone or multiple zones (according to Air Barrier Association of America Guidelines)
- Prohibit partially guarded tests



Compartmentalization Test Procedures

- Dictate blower door location in entry doorway
 - Between unit and corridor/outside
 - Assess weather-stripping & door sweep
 - Penalty for leaky doors
- Dictate protocols for pressure relief in hallway
 - Minimize window & door opening
 - 3 stories and lower vs. 4 stories and higher
 - Minimize stair travel



Compartmentalization Test Procedures (cont'd)

- Keep ceiling access panels open
 - Exceptions
- Open mechanical doors to mechanical closets
 - Exceptions
- Calculate enclosure square footage
- Note, this is the only test result that can be used in an ERI....



Duct Leakage Testing for Multifamily

- Mostly ANSI 380
- Changed from Guidelines
 - Non-ducted returns
 - Setup on air handler
 - Closet leakage captured in blower door testing
- Kept from Guidelines
 - Testing Exemptions
 - In progress and in coordination with Modeling Task Group

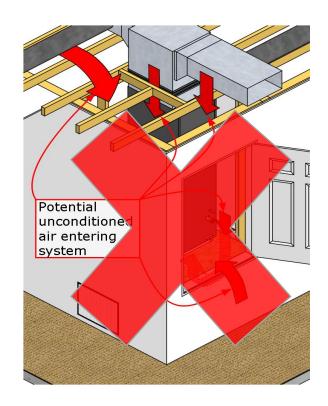
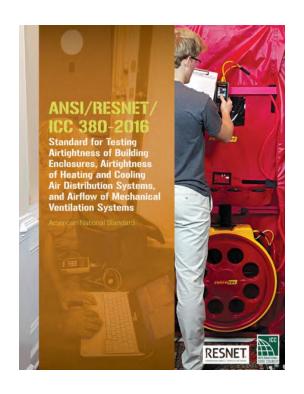


Image from DOE Measure Guideline: Air Sealing Mechanical Closets in Slab-On-Grade Homes



Next Steps for the Task Group...

- Draft Amendment to ANSI 380:
 - Blower door testing
 - Duct blaster testing
 - Ventilation airflow testing
- TBD
 - Central DHW testing?
 - Central Exhaust Riser leakage tests?





Questions?

Next Up: Sampling



RESNET MF SC Sampling Task Group

Task Group Members:

Thiel Butner (Pando Alliance)	Matt Root (CLEAResult)
Paul Gay (US Eco-Logic)	Gayathri Vijayakumar (SWA)
Rebecca Hudson (EPA)	Mentor: Daran Wastchak

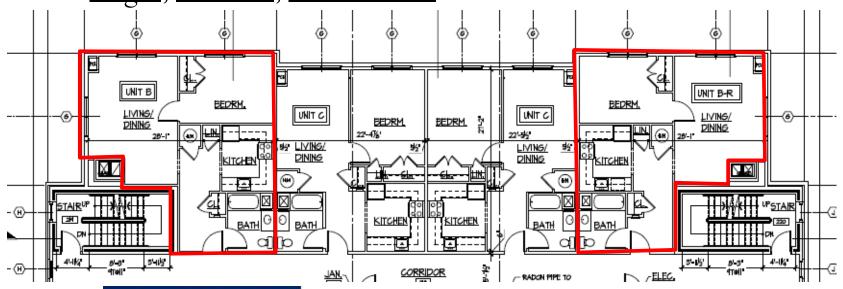
- What's different from Guidelines and Chapter 6?
- Where will it live?
- Big Change: Separate Sampling for <u>Modeling</u> from Sampling for <u>Testing & Inspections</u>



Sampling (for Modeling)

- Where will it live? Section 5 of ANSI 305 (not Ch 6)
- Selecting Unique Unit Types

• Same envelope, #BR, CFA, #bathrooms, enclosure area, ceiling height, #stories, window area





Sampling (for Modeling)

- Worst-Case Specifications & Configuration
 - Mid-level, interior units are no longer automatically exempted
- Setting Testing Thresholds
- Application of Field Results
- Assignment of Energy Rating Index (ERI)
- NEW! Confirmed vs Sampled Ratings
 - Can really high performing units use their verified data and upload as "confirmed" ratings?
 - Yes, if they meet all the requirements of a "confirmed" rating



Sampling (for Testing & Inspections)

- Similarities & Differences: Single Family vs. Multifamily
- Core Sampling Concepts for Inspections and Testing
- Shift from Sampling in Chapter 6
- Shift from Sampling in the Multifamily Guidelines
- Introduction of New Concepts in Multifamily Sampling



Single Family and Multifamily

Similarities:

- Residential construction
- Process: Design → Build/Inspect → Analyze/Certify
- Project teams are groups of individuals



Single Family and Multifamily

Differences:

Single Family

Multifamily

Custom options

Designed early

• Smaller scale (# units) • Larger scale (# units)

Slower construction
 Faster construction

Ongoing timeframe
 Fixed project size



Core Sampling Concepts

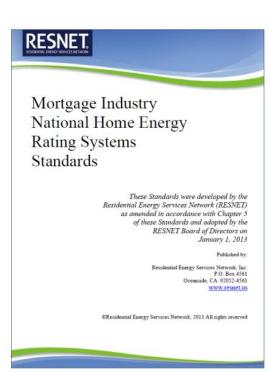
- Consistent construction types
- Consistent project team
- Regular and frequent inspections
- Approximately 7-in-a-row perfect, first
- Approximately 1-in-7 sampling rate
- All minimum rated features not inspected/tested
- Root cause analysis
- General terms and definitions



Chapter 6 Rew MF Sampling

Similarities:

- Purpose
- Labeling
- Grouped by readiness
- Sampling Controls
- 7-in-a-row, first

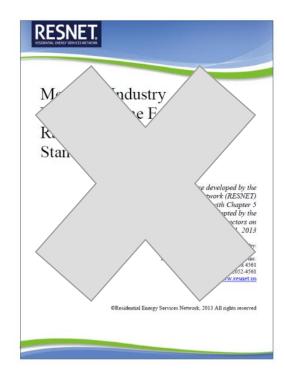




Chapter 6 Rew MF Sampling

Differences:

- Application of results
- Assignment of HERS
- Replaced 30-day rule
- Removed 90-day rules
- 1-in-7 $(0.143) \rightarrow 15\%$
- Recording sample sets
- Failures process

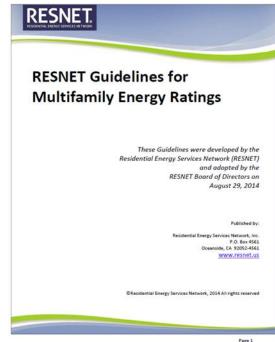




Guidelines New MF Sampling

Similarities:

- Sampling cohorts
- Sampling controls
- Distribution of units
 - Types and attributes
 - Location and timing



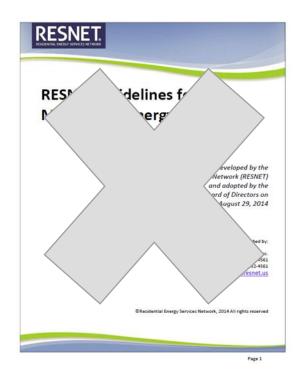




Guidelines New MF Sampling

Differences:

- Inspections/testing vs. modeling
- "Sampling Providers"
- Res.-assoc. common spaces
- Selecting/grouping
- Failures process
- All units must pass





New Concepts MF Sampling (for Inspections & Testing)

No Sampling Provider

- Authority Having Jurisdiction (shift toward ANSI)
- Documentation required in project file

No Sample Sets

- Select units based on attributes
- Measure 15% of project, not 1 out of every 7

No 30- or 90-day Rules

Analyze entire project



(1 of 3)

New Concepts MF Sampling (for Inspections & Testing)

Sampling Plan

Define components in detail

Quality Control Plan

- Assign individual responsibility
- Define sampling controls
- Conduct trades training

Residential-Associated Common Spaces

Eligible for all aspects of sampling



(2 of 3)

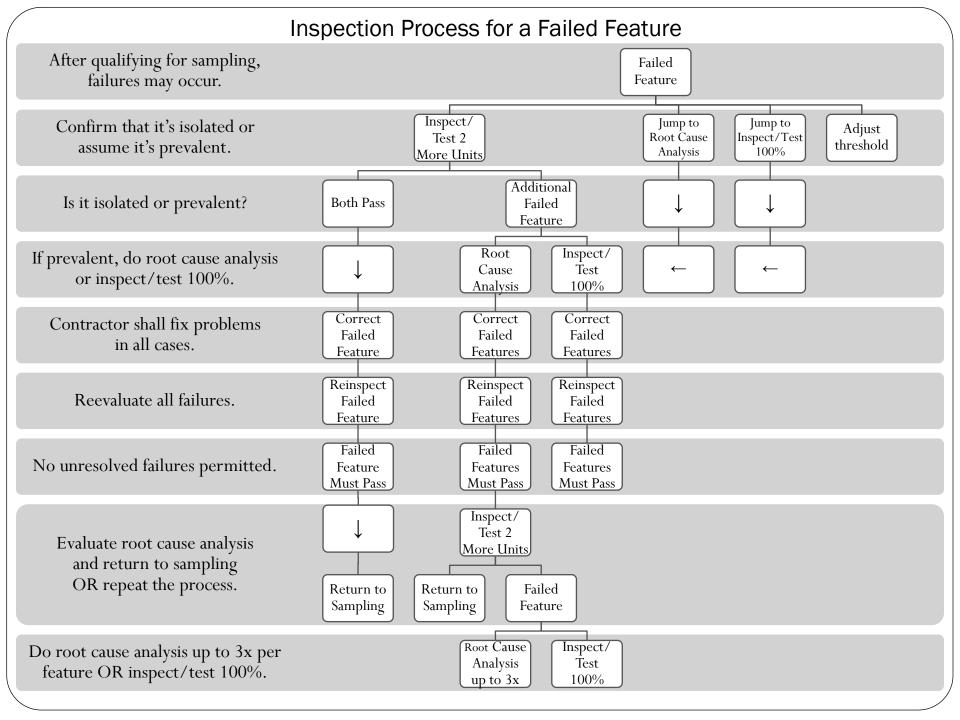
New Concepts MF Sampling (for Inspections & Testing)

Failures Process

- Option to test two additional units
- Elevated Root Cause Analysis (RCA) procedure
- RCA or 100% testing before sampling again
- Up to three RCAs per failed feature
- All failures must be corrected
- Adjustment of performance thresholds



(3 of 3)



Next Steps for the Task Group...

- Appendix in ANSI 305 or 380
 - Appendix for sampling MF inspections and testing

- MF modeling remains separate
 - ANSI 305 will include sampling for MF modeling

- Two paths for inspections & testing
 - Simplified or detailed



Questions?

Next Up: Wrap-up



Highlights coming in ANSI 305&380

- Modeling (Presented by Brian Christensen)
 - ANSI 305 a new MF Standard, but like ANSI 301
- Inspections (Presented by Gayathri Vijayakumar)
 - ANSI 305, Appendix A
- Testing (Presented by Gayathri Vijayakumar)
 - ANSI 380 this Standard will be revised with a multifamily amendment)
- Sampling for Modeling (Presented by Gayathri Vijayakumar)
 - ANSI 305 Section 5
- Sampling for Testing & Inspections (Presented by Thiel Butner)
 - ANSI 305 or 380, Appendix ____



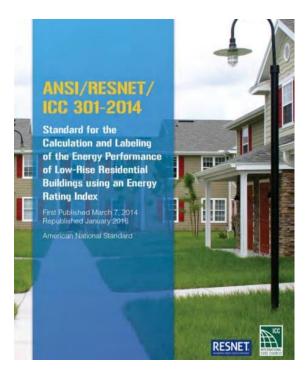
ANSI 301 ANSI 305

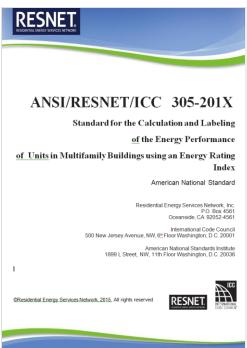
ANSI 380

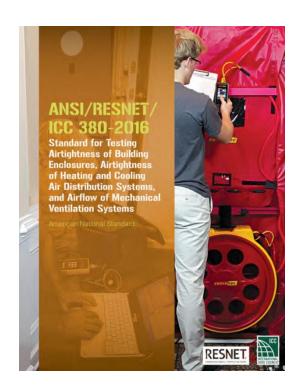
Single Family

Multifamily

All









Setting the Standards for Home Energy Efficiency

Next Steps for the Sub-Committee

- ANSI/RESNET/ICC 305-201X & 380-2016 Amendment
 - Summer 2017: Draft to RESNET SDC 300 & Equipment SC
 - Fall 2017: Draft out for Public Comment
 - Spring 2018: Revisions & additional Public Comment
 - Summer 2018: Finalized and published
 - Spring 2019: Proposed for inclusion in the 2021 IECC



Questions?

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