

PERFORMANCE SYSTEMS
DEVELOPMENT

We Speak  Building



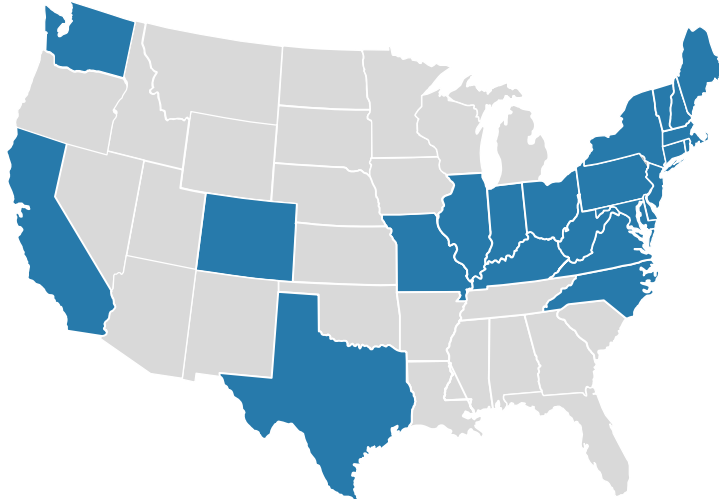


Raters' Perspectives on New Homes Programs: Designs that Drive Participation

Emelie Cuppernell & Kathy Greely
Performance Systems Development

March 1, 2017





Programs



QA & HERS Provider



Software



Training and Services

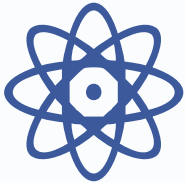
Founded in
1998

40+
Employees

4
Locations



Deliver



Programs

RNC/CNC
Codes
Whole Building

Support



Professional Services

Training
Energy Engineering
Rater Providership

Empower



Software

Program Management
Field Tools
Applications



Who are you?

Rater

Provider

Builder

Utility or
State Program

Program
Implementer

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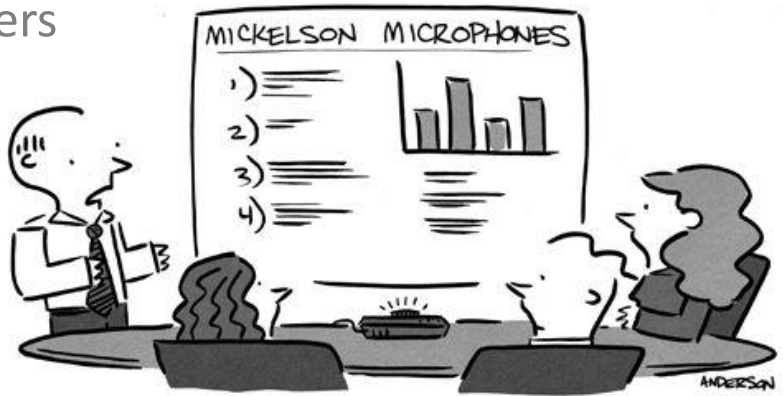
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- HERS Provider
- NEHERS
- New Homes Implementer
- Codes Trainer
- Software Developers

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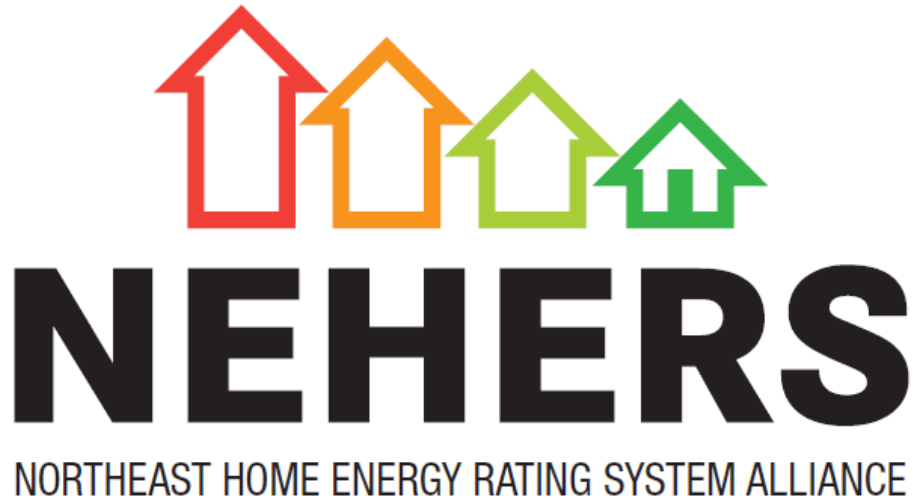
"The good news is we're getting a lot of feedback.
The bad news is we're getting a lot of feedback."



- Utilities:
 - “What do raters care about?”
 - “How do I get raters to promote my program?”
 - “Is my program giving them what they need?”
- Raters: critical trade allies for New Homes Programs
 - “Why does the utility keep changing the rules?”
 - “Why is there so much paperwork???”
- Today, we draw back the curtain.....



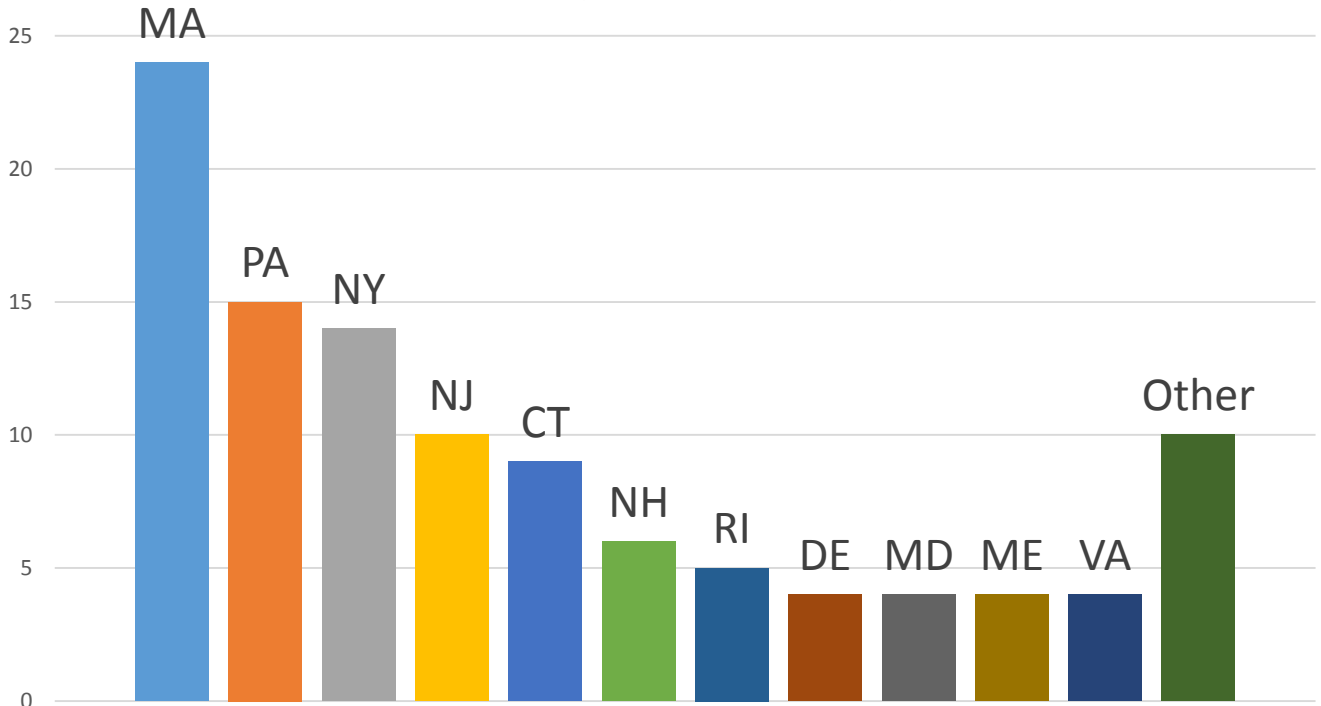
- 56 NEHERS Raters
- 16,000 ratings per year



In What States does your Company Actively Perform Ratings?



States Participants Perform Ratings In

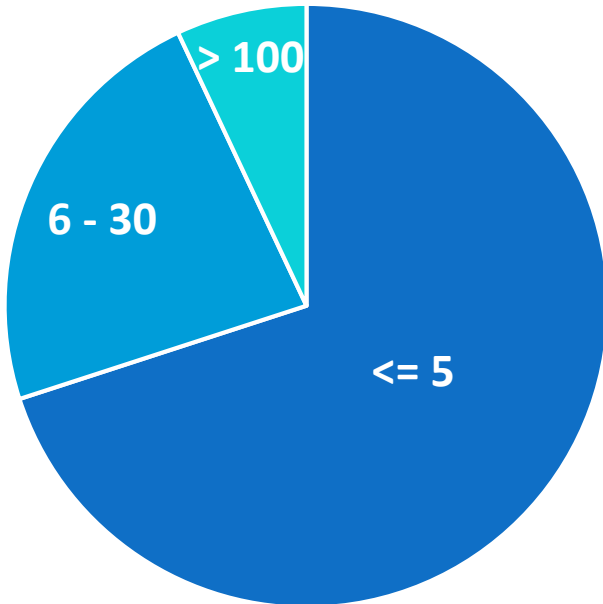


Other = AR, GA, IL, KS, MN, MO, SD, VT, WI, WV

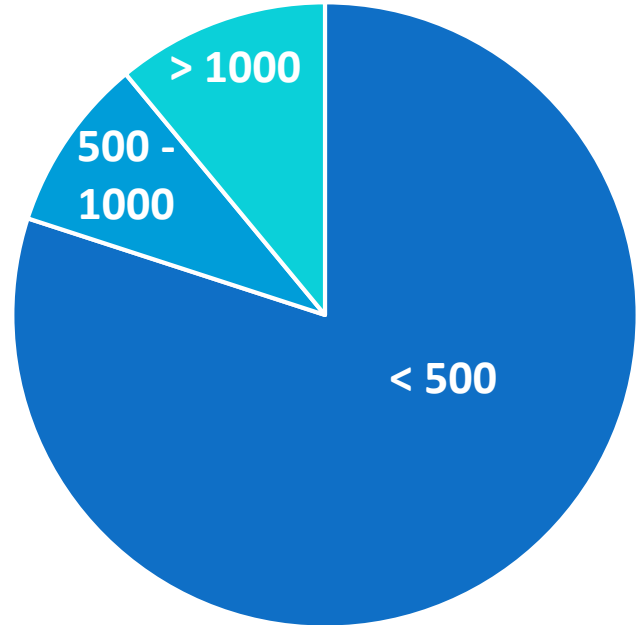
Most Raters are Small Businesses



Number of Employees



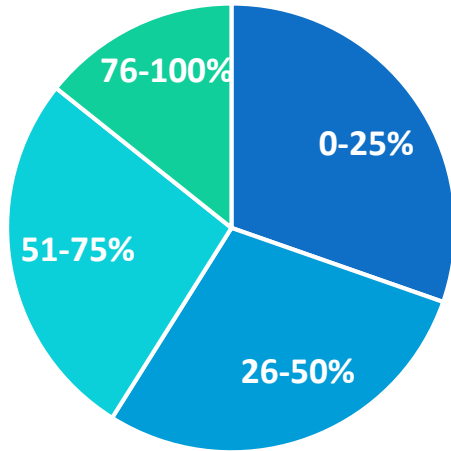
Number of Ratings/Year



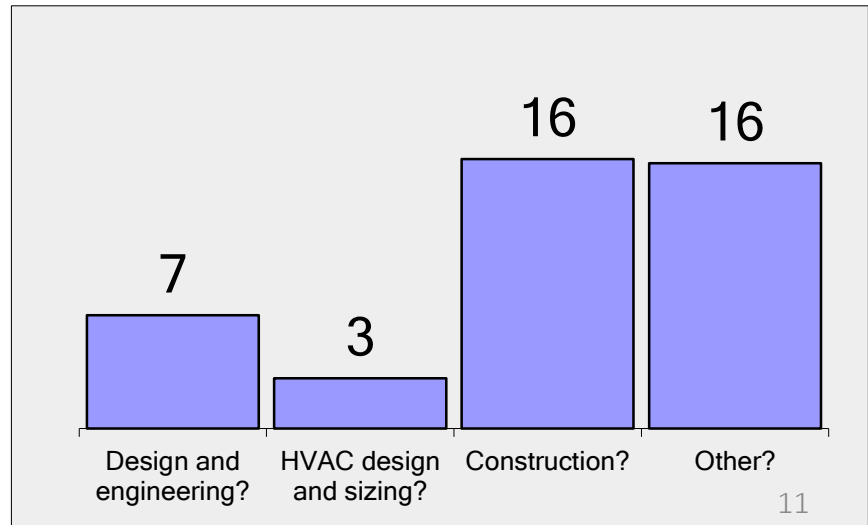
What do Raters' businesses look like?



% of Revenue from Ratings



What % of your revenue comes from non-rating testing for code compliance?





What drives your
business?

% of your HERS ratings are submitted for each following?

- Code Compliance
- Utility/State Programs
- Federal Tax Credit
- Energy Smart Builder
- LIHTC
- Passive House
- Zero Energy Ready

Prescriptive

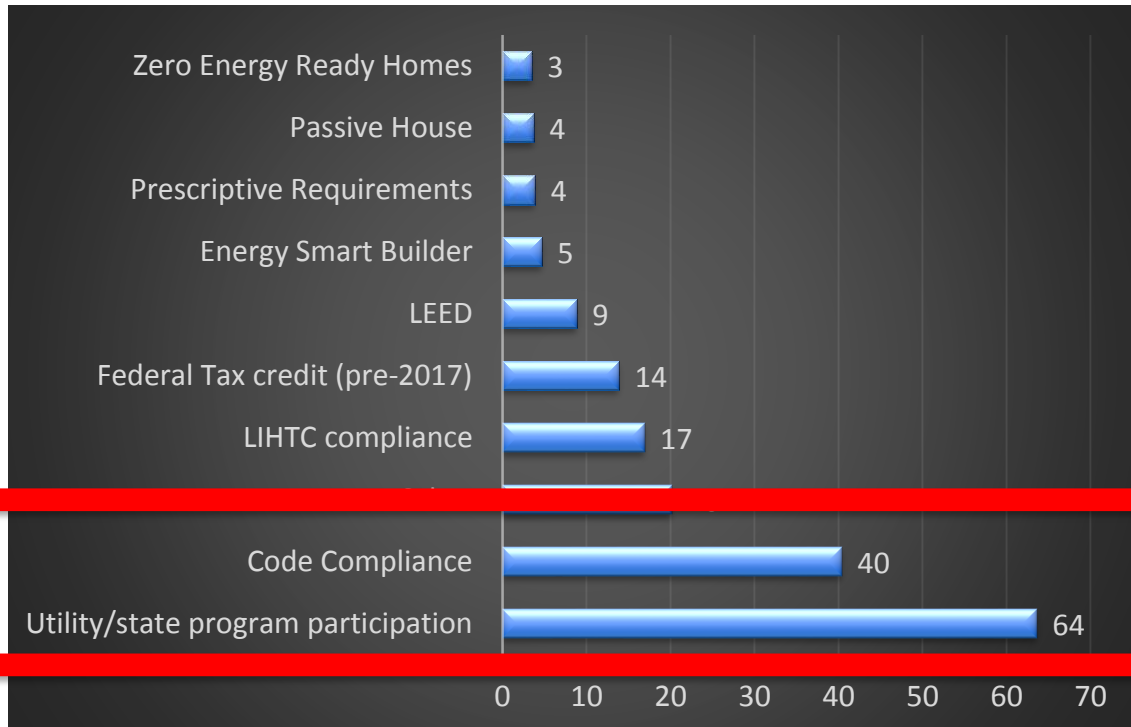
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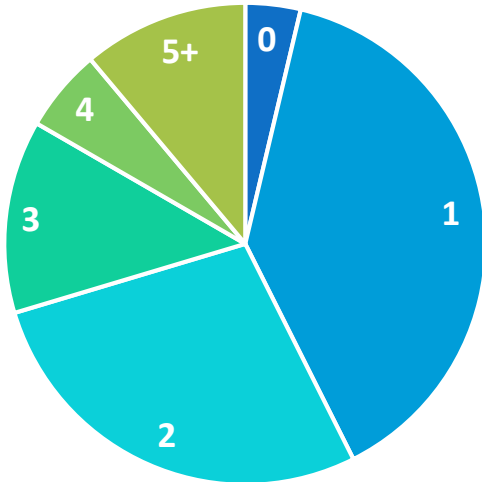
What percentage of your HERS Ratings are submitted for each of the following?



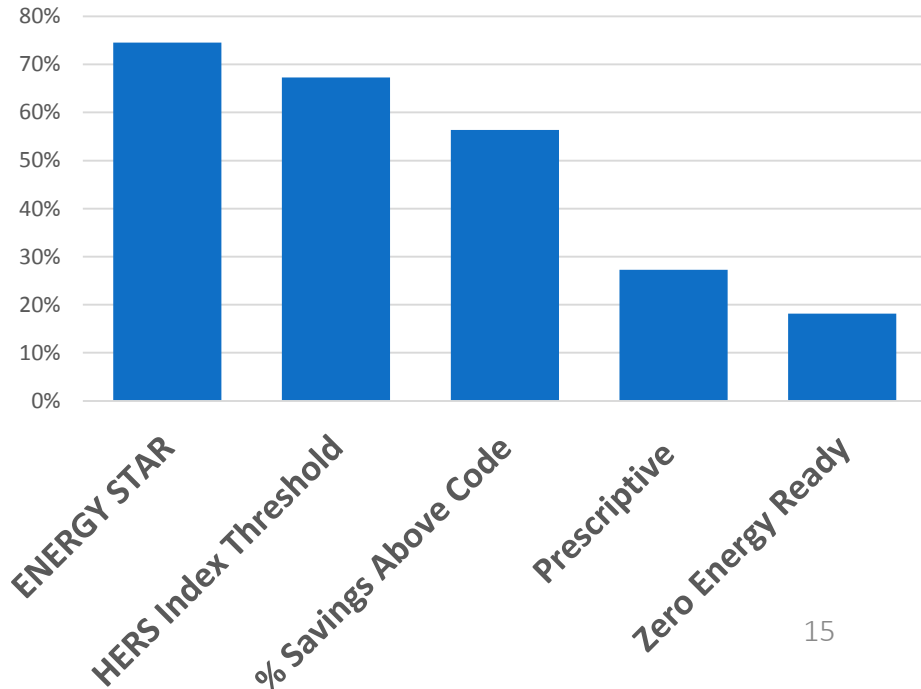
So, what are the programs?



How many Programs do you Participate In?



What are the Qualification Criteria?





How important are
programs to your
business?



What percentage of ratings would you continue to do, in the absence of program incentives?

0-25%

25-50%

50-75%

75-100%

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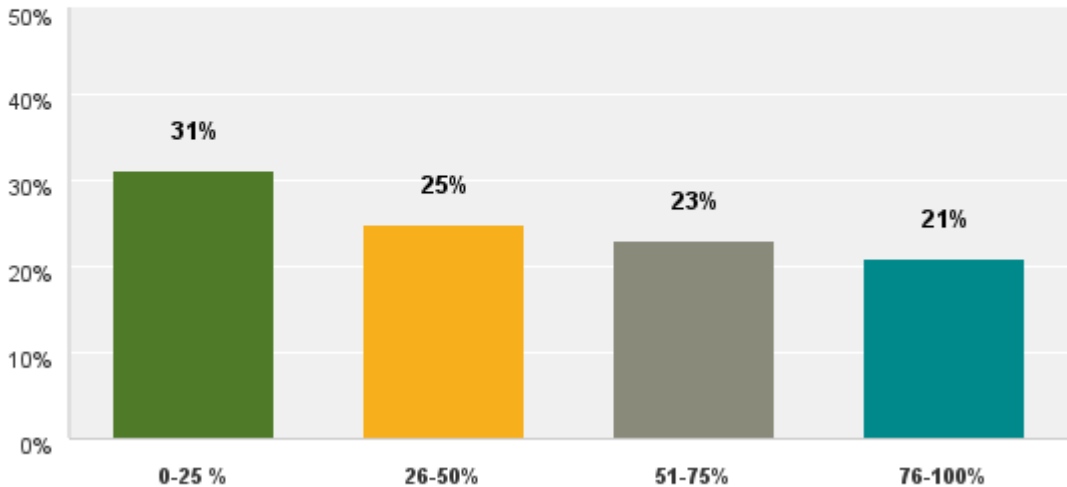
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Q28 What percentage of your current ratings would you continue to do, in the absence of program incentives?

Answered: 48 Skipped: 8





How is program support
valued?



Form of program support is most important to

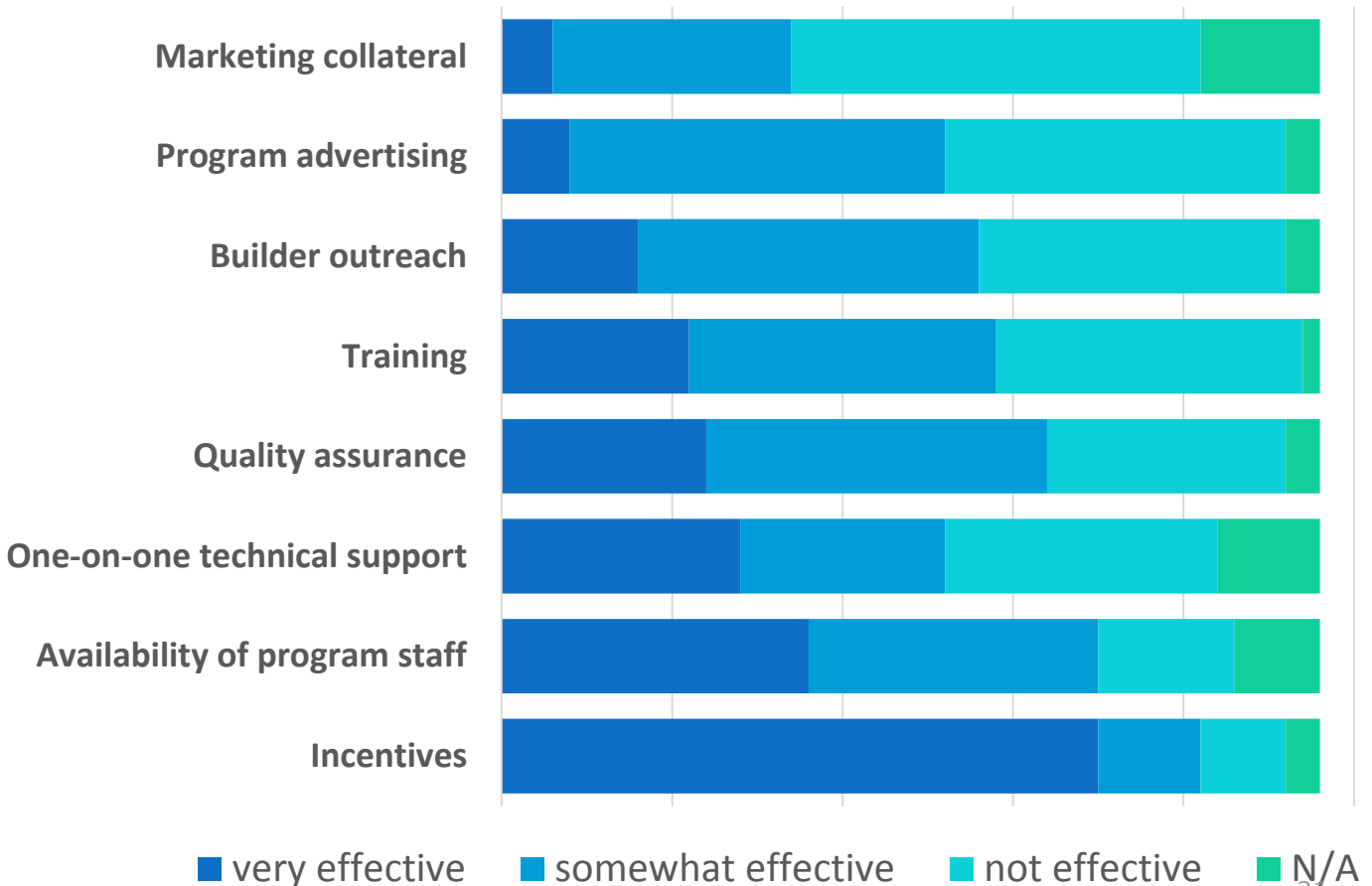
- Marketing Collateral
- Program Advertising
- Builder Outreach
- Training
- 1-1 Technical Support
- Quality Assurance
- Availability of Staff

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How do programs support your business?

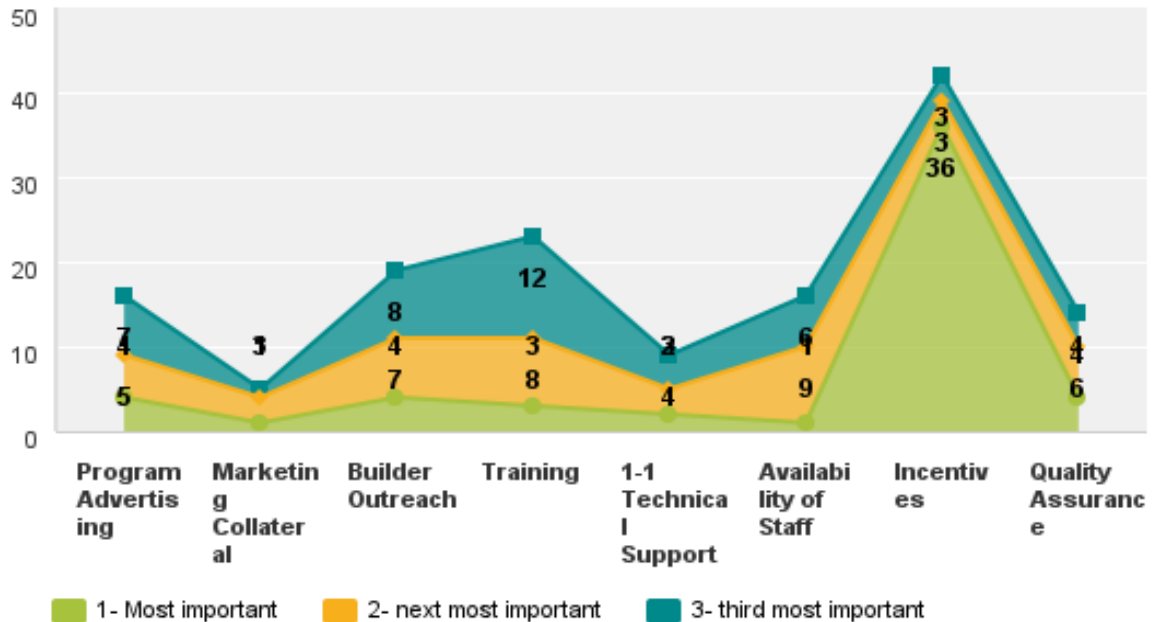


How is Program Support Valued?



Q30 Top three categories of support your programs offer

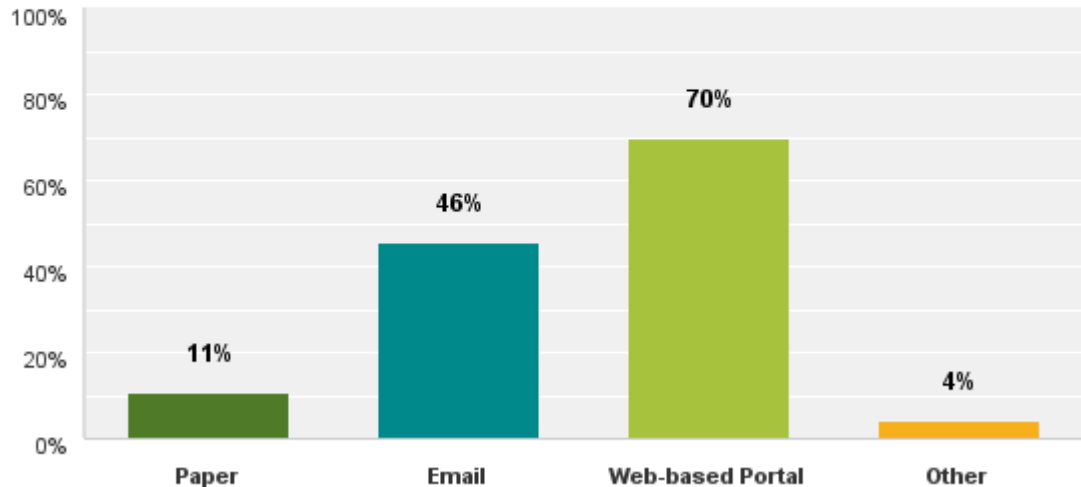
Answered: 48 Skipped: 8





Q31 How do you submit homes to the programs you participate in (check all that apply)?

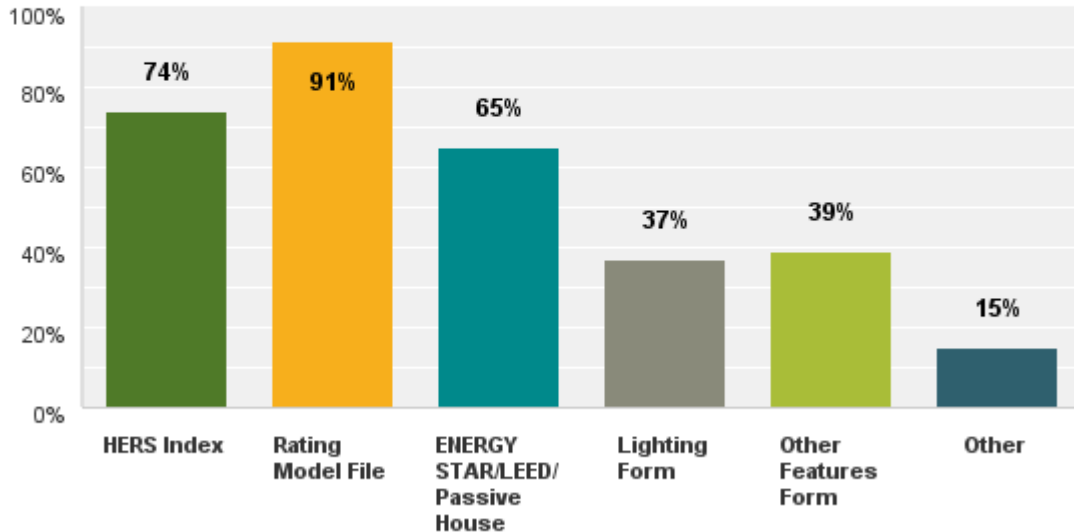
Answered: 46 Skipped: 10





Q32 Required program submittal documentation:

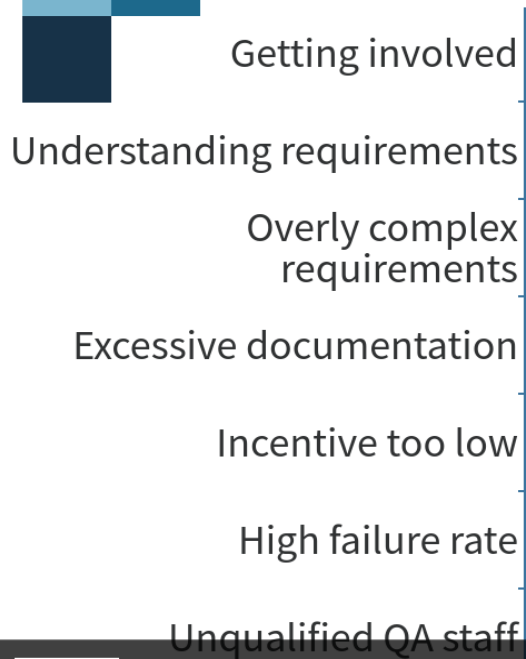
Answered: 46 Skipped: 10





What are hurdles to participation?

What factors are a hurdle to program participation



Changes in starting frequency

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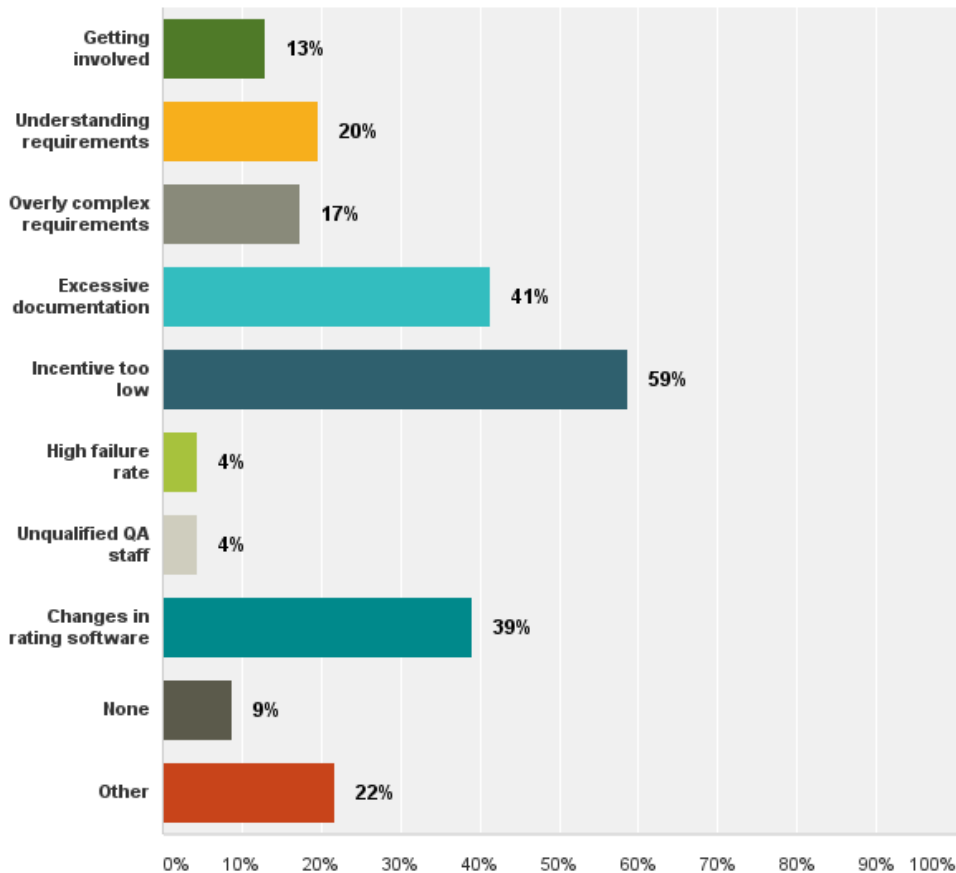
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Q33 What factors, if any, present a hurdle to your participation in a program?



Answered: 46 Skipped: 10





Raters' Voices

What they wish programs understood



Too much reporting & too many requirements

- ***I wish there was less paperwork.*** *The building model and field checklists seem like enough.*
- *Many are small companies, we don't have staff to sit around with piles of paper and constant updates.*
- *Program work is frustrating and bureaucratic.*
- *Too much reporting and admin by some...Very micro managed...*
- *Programs should try to **align with national standard** they are based on. I.e. if ENERGY STAR, don't add additional levels of prescriptive items, admin paperwork, and/or additional testing that burdens and discourages builders and raters.*
- *Keep it simple, incentivize E-STAR (it's an important brand that we've help build over 10-yrs) incentivize code compliance using ERI*





*Too often programs implement every idea they have that they feel will make the program "better", and by better I mean more bulletproof from outside criticism and easier for them to administer. **Rating companies can only do this work so long as we can make money doing it**, and there are only so many hours in the day. Every minute the programs take away from us with their **excessive busy work requirements takes away from the time we have to spend with our builders** making their homes better...what's best for the program gets translated as what's best for the program manager and that needs to stop.*



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- **Too many changes, too quickly** (incentives, requirements, software)
- *Changing program rules/regs; excessive reqmts for xxx*
- *Program requirements/incentives 'thrashing'*
- *Reduced Rater and builder incentives, **phase out of payouts***
- *Programs change too often*
- *keep incentive structure simple and consistent across program years*





- “You need to honor enrollment for projects entered into the system for the incentives they were enrolled for. **Changing mid stream is bad business** for all parties except the utilities that don’t care.”
- **Quality Assurance** using RESNET QA is critical to ensure the playing field is level.





- ***Builders don't know the programs exist.***
- *Time consuming obligation to advise all new builders about every applicable requirement for ESTAR and NAHB Green.*



A dark, futuristic space scene with a large, complex structure, possibly a space station or a large ship, illuminated by various lights. A bright light source is visible on the right side, creating a lens flare effect. The background is filled with stars and distant galaxies.

**WHERE DO WE GO
FROM HERE?**



What do participants in your program think?



And how could you find out?





Create an avenue for feedback and/or input

- Monthly Call
- Survey
- Quarterly Meeting
- Webinar
- QA Feedback Loop
- One-on-one Contact





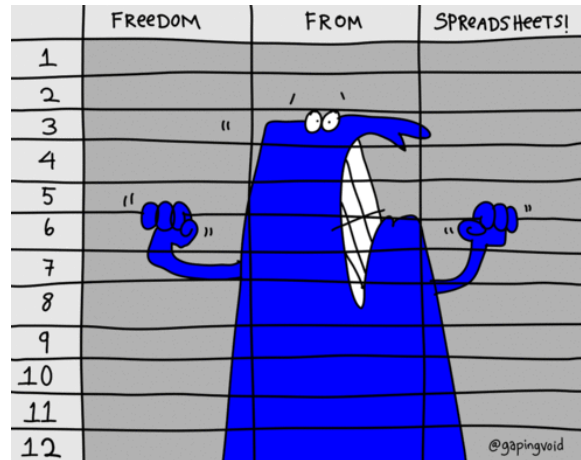
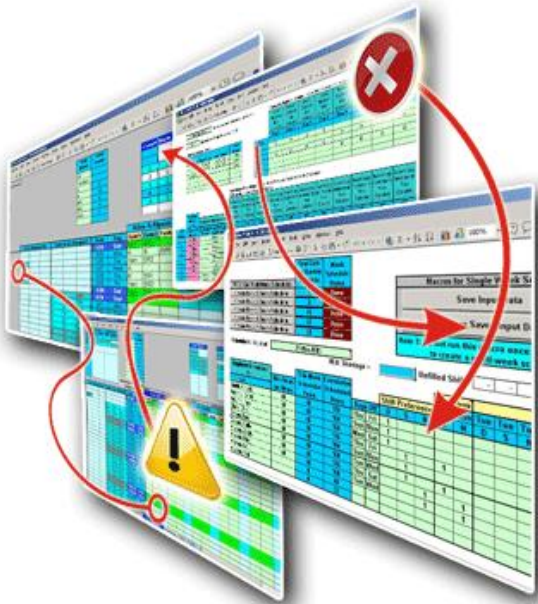
Paperwork Stinks



Common Trends



Spreadsheets stink too!





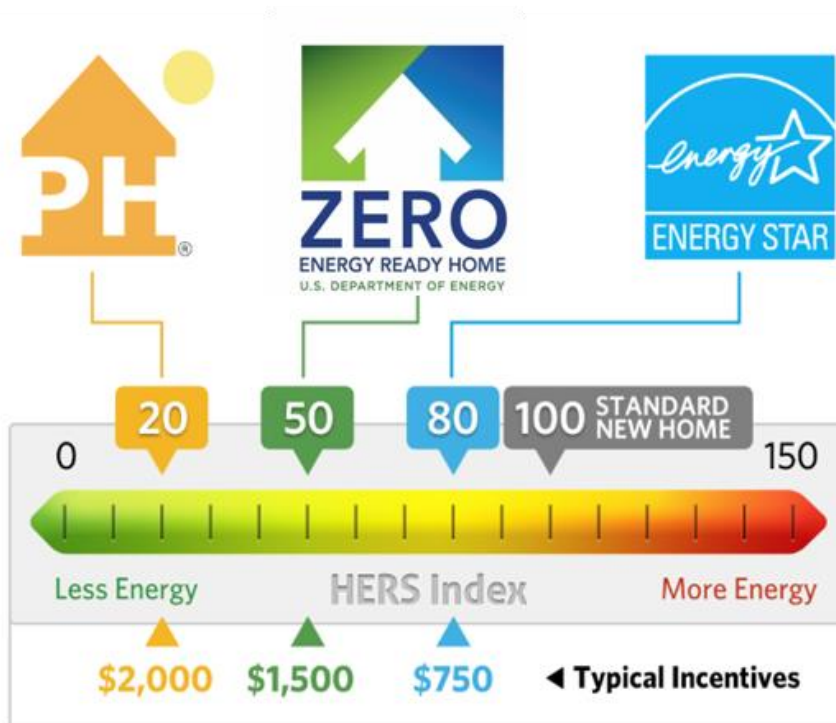
Extras bog down the process.....



Common Trends



Align with National Standards



Above code programs and typical Incentives for single family homes



Money Matters



Common Trends



- Have staff that speak Rater
- Have staff that speak Builder





Help Educate Builders



PENNSYLVANIA PROUD

Builders across Southeast Pennsylvania are showcasing their construction skills with more energy efficient homes.

The Keystone State is built on innovation. Less so further than the advanced energy efficient techniques that are saving homeowners 30 percent or more on their energy bills.

Builders of high-quality homes benefit through the Pennsylvania Energy Efficient New Homes Program. Eligible builders can receive thousands of dollars in financial incentives.

To receive incentives for innovative home building practices, visit EnergyEnePA.Norfolk.com

Met-Ed™
Penelec™
Penn Power™
West Penn Power™

Partnership Program



- Align with national protocols
- Accept multiple tools
- Accept multiple versions
- Advance notice of transitions
- Persistence & effect on incentives

Common Trends



Change is inevitable....but change is hard.

