

# Oregon's Home Energy Performance Score System

## *Information and Application*

### BACKGROUND

The administrative rules for House Bill 2801 became effective July 1, 2014, establishing requirements for home energy performance score systems for the purpose of:

1. Energy conservation and energy efficiency of new and existing residential buildings in Oregon.
2. Energy use in new and existing commercial buildings in Oregon.

In an effort to support energy performance score systems that choose to operate in Oregon, the application form below is required. The Oregon Home Energy Performance Score Stakeholder Panel will review each application to determine if the system meets all requirements. Each element of the system process will be reviewed and recommendation made, prior to submitting to the Director of the Oregon Department of Energy for final approval.

In its review of a home energy performance score system, the stakeholder panel must review all required elements of the home energy performance score system listed in Oregon Administrative Rules 330-063-0015.

To ensure comprehensive and accurate review of a system provider and its operations, please review the following information to provide background for an application.

Each home energy score system must:

- Generate a performance score that meets requirements of OAR 330-063-0015(2)
- Generate a performance report that meets requirements of 330-063-0015(3) and (4)
- Incorporate building energy software that is used to derive information in a home performance report. See: 330-063-0015(1)(c)
- Provide or specify required training in the use of the home energy performance score system for home energy assessors. See: 330-063-0015(1)(d)
- Establish a minimum home performance standard for quality assurance. See: 330-063-0015(1)(e)
- Provide evidence of how the system uses an asset rating method for scoring purposes. See: 330-063-0015(2)
- Include the following information on a one-page, single-sided document. See: 330-063-0015(3)
  - (a) The home energy performance score described in 330-063-0015(2) and an explanation of the score; See: 330-063-0015(3)(a)

(b) An estimate of the total annual energy used in the home in retail units of energy, by fuel type; See: 330-063-0015(3)(b)

(c) An estimate of the total annual energy generated by on-site solar electric, wind electric, hydroelectric, and solar water heating systems in retail units of energy, by type of fuel displaced by the generation; See: 330-063-0015(3)(c)

(d) An estimate of the total monthly or annual cost of energy purchased for use in the home in dollars, by fuel type, based on the current average annual retail energy price of the utility serving the home at the time of the report; See: 330-063-0015(3)(d)

(e) The current average annual utility retail energy price in dollars, by fuel type, used to determine the costs described in subsection (d) of this section, above.

(f) At least one comparison home energy performance score that provides context for the range of possible scores. Examples of comparison homes include, but are not limited to, a similar home with Oregon's average energy consumption, the same home built to Oregon energy code, and the same home with certain energy efficiency upgrades. See: 330-063-0015(3)(f)

(g) The name of the entity that assigned the home energy performance score and that entity's Construction Contractors Board license number, if such a license is required by law; See: 330-063-0015(3)(g)

(h) The date the building energy assessment was performed; See: 330-063-0015(3)(h)

(i) The statement "This report meets Oregon's Home Energy Performance Score standard." Reports generated by home energy performance score systems that have not been approved for use in Oregon according to OAR 330-063-0020 may not include this statement. See: 330-063-0015(3)(i)

Additional information that may be presented in a home energy performance report includes, but is not limited to:

(a) A list of recommended energy efficiency upgrades for the building; See: 330-063-0015(4)(a)

(b) A hypothetical home energy performance score representing the score the building would be expected to receive upon completion of the energy efficiency upgrades in 330-063-0015(4) (a); See: 330-063-0015(4)(b)

(c) The estimated amount of carbon dioxide (CO<sub>2</sub>) equivalent emissions, in metric tons, resulting from the energy used in the home based on the carbon intensity, as reported on the department's website, of the electricity provided by the electric utility that serves the home, natural gas and other fuel types used in the home. See: 330-063-0015(4)(c)

## **REQUEST FOR REVIEW AND APPROVAL**

An entity seeking approval for use of a home energy performance score system in Oregon must submit to the department a written request for review and approval. The request must include:

(A) A copy of or an internet link to the building energy assessment software used by the home energy performance score system. See: 330-063-0020(2)(a)(A)

(B) A sample of the home energy performance report generated by the home energy performance score system. See: 330-063-0020(2)(a)(B)

(C) A copy of test results demonstrating the accuracy of the building energy assessment software used by the home energy performance score system. See: 330-063-0020(2)(a)(C)

(D) Other information that may be necessary for the stakeholder panel to make a recommendation to the Director. See: 330-063-0020(2)(a)(D)

## Application for Home Energy Performance Scoring System (HEPSS)

1. Provide a copy of or an internet link to the building energy assessment software used by the home energy performance score system.

(Type here)

2. Provide a copy of test results demonstrating the accuracy of the building energy assessment software used by the HEPSS. See: 330-063-0020(2)(a)(C).
3. Summarize the test protocol/procedure and results below.

(Type here)

4. Provide documentation of the physical inspection/rating protocol and training requirements for your HEPSS. See: 330-063-0020(2)(a)(D).
5. Describe how your HEPSS generates an asset rating that is based on physical inspection of the home or design documents used for the home's construction.

(Type here)

6. Describe the required training for the use of the HEPSS for home energy assessors.

(Type here)

7. Provide documentation of the minimum quality assurance standards for your HEPSS. See: 330-063-0020(2)(a)(D).
8. Describe the minimum standards for quality assurance for your HEPSS.

(Type here)

9. Provide a sample of the home energy performance report generated by the home energy performance score system and verify that it meets minimum requirements set forth in

the administrative rules. See: 330-063-0020(2)(a)(B)(D). In order to comply, the report must contain the following:

- a. A home energy performance score, which is an asset rating that is based on physical inspection of the home or design documents used for the home's construction.
  - b. An explanation of the score.
  - c. An estimate of the total annual energy used in the home in retail units of energy, by fuel type.
  - d. An estimate of the total annual energy generated by on-site solar electric, wind electric, hydroelectric, and solar water heating systems in retail units of energy, by type of fuel, displaced by the generation.
  - e. An estimate of the total monthly or annual cost of energy purchased for use in the home in dollars, by fuel type, based on the current average annual retail energy price of the utility serving the home at the time of the report.
  - f. The current average annual utility retail energy price in dollars, by fuel type, used to determine the estimate of the total monthly or annual cost of energy purchased for use in the home.
  - g. At least one comparison home energy performance score that provides context for the range of possible scores. Examples of comparison homes include, but are not limited to, a similar home with Oregon's average energy consumption, the same home built to Oregon energy code, and the same home with certain energy efficiency upgrades.
  - h. The name of the entity that assigned the home energy performance score and that entity's Construction Contractors Board license number, if such a license is required by law.
  - i. The date the building energy assessment was performed.
  - j. The statement "This report meets Oregon's Home Energy Performance Score standard."
10. If the example report for your HEPSS does not meet one of the requirements above, describe how the report will be modified to meet the requirements, as well as the timeline for such modifications to be completed.

(Type here)

11. You may provide additional information as part of your application if you feel it will help the stakeholder panel and the Director make their determinations to approve your home energy performance score system for use in Oregon. Examples of additional information that may be presented in a home energy performance report includes, but is not limited to:
- k. A list of recommended energy efficiency upgrades for the building.
  - l. A hypothetical home energy performance score representing the score the building would be expected to receive upon completion of the energy efficiency upgrades.
  - m. The estimated amount of carbon dioxide (CO<sub>2</sub>) equivalent emissions, in metric tons, resulting from the energy used in the home based on the carbon intensity, as reported on the department's website, of the electricity provided by the electric utility that serves the home, natural gas and other fuel types used in the home.

Date: \_\_\_\_\_

**WARNING:** Failure to keep this form current and to file accurate supplementary information on a timely basis, or otherwise to comply with the provisions of law applying to the conduct of business as a home energy performance score system provider would violate the laws of the *jurisdictions* and may result in disciplinary, administrative, injunctive or criminal action. INTENTIONAL MISSTATEMENTS OR OMISSIONS OF FACTS MAY CONSTITUTE CRIMINAL VIOLATIONS.

Initial application \_\_\_\_\_

Amended application \_\_\_\_\_

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Name of primary applicant

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Additional system contributors (if combined to produce scores)

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Business address of primary applicant

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Mailing address (if other than business address)

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Telephone number

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Contact person

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Full name of applicant (if sole proprietor, state last, first and middle name)

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IRS identification number

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Name under which business is primarily conducted

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Signature of applicant and/or representative of score system

Date of signature: \_\_\_\_\_