Home Energy Score in the Bay Area
Assessor Orientation

September 2021
1. BayREN Overview
2. Home Energy Score Overview
3. The Home Energy Score Report
4. Assessor Eligibility & Requirements
5. Training & Assessor Support
6. Quality Assurance & Program Mentoring
7. Pilot Programs
8. Rebate Information
BayREN is a collaboration of the 9 Bay Area counties that delivers targeted, integrated, and regional-scale climate solutions focused on energy, water, and resilience.
History & Impacts

• RENs are a critical part of the solution for the State’s **reliable and sustainable energy future** that considers water, greenhouse gases, and resiliency

• Since 2013, the programs have provided significant benefits for:
  - Residential tenants and property owners
  - Building industry & real estate professionals
  - Energy and water contractors
  - Small business owners
  - Local governments
Programs

Uses ratepayer funds from PUC to run programs:

- **Residential**
  - Single Family
  - Multifamily
  - *Green Labeling* – includes HES

- **Codes & Standards**

- **Commercial (SMB)**

- **Financing**
  - Water Upgrades $ave
  - Multifamily Capital Advance
What is Home Energy Score?

• The U.S. Department of Energy created the Home Energy Score (HES) to serve as a nationally standardized “miles-per-gallon” rating for homes

• Offers homeowners affordable, reliable, easy way to understand homes’ energy performance

• Available at no-cost to program providers

• Motivates homeowners to invest in residential energy efficiency
  • Simple and action-oriented
  • Ability to document investment in energy efficiency using the post-improvement score
  • Allows comparison between homes regardless of location

• Home Energy Score website: www.homeenergyscore.gov
Home Energy Score Basics

• Who typically provides it?
  • Qualified Assessor working under a Home Energy Score Partner
  • StopWaste is the Partner in the San Francisco Bay Area

• What does a homeowner get?
  • Home Energy Score Report
    • Asset Score between 1 and 10
    • Home Facts: List of data collected and energy use calculations
    • Recommendations for improvements for now or later
Home Energy Score Report

- Takes an hour or less to complete
- Can be generated by home inspectors, contractors, utilities, raters, and others
- This free on-line tool can be used directly or linked to other software tools
- No reporting requirements, all automated
40+ Data Points Collected

• No specialized equipment needed (blower door, infrared camera, etc.)

• Significant overlap with a Home Inspection Report

• Low-cost service
  • Less than 15 minutes if done as part of a home energy audit
  • Less than 1 hour if done as a stand-alone assessment

• Ongoing analysis and a continuous improvement process by DOE/NREL
Benefits & Opportunities

Qualified Assessors will receive:

- Free training, before and after joining the program
- Access to Home Energy Score materials/guidelines from DOE
- Rebates for each Assessment, while funds last
- Subsidized Mentoring and Quality Assurance
## Assessor Eligibility & Requirements

### Qualification Requirements

| Eligibility and Credentialing Pre-Requisites | Candidate must work under StopWaste, an official DOE Partner  
- Work in one of the nine Bay Area counties  
- Possess all required insurance  
- Hold a current DOE recognized credential |
|---------------------------------------------|-----------------------------------------------------------------|
| Practical Test                              | Candidate uses the Home Energy Score 3D Simulation Tool to retrieve home characteristic data and to score  
- Three “Practice/Challenge” Homes (80 or better)  
- Two Test Homes (90 or better) |
| Written Exam                                | Score of 80 or better on multiple choice test that includes 20 questions regarding the Home Energy Score program only |
| Quality Assurance                           | 5% of homes must be rescored under a DOE approved quality assurance plan |
| Mentoring                                   | First home scored with a mentor; counts toward quality assurance requirement  
- Mentoring will be performed by either a QA appointee OR another experienced Qualified Assessor |
Steps to Becoming a Qualified Assessor

1. Complete the StopWaste Home Energy Score Assessor Participation Agreement
   – Demonstrate minimum building-related credentials
   – Let us know if you work in the City of Berkeley*

2. Gain access to the FREE 3D Sim tool

3. Complete the two-part 3D Sim training & testing

4. Conduct your first Home Energy Score Assessment with a Mentor

*The City of Berkeley has additional training and requirements for Assessors
Assessors must hold a relevant credential from one of these residential trade organizations:

<table>
<thead>
<tr>
<th>Organization</th>
<th>Minimum Accepted Credential</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Society of Home Inspectors (ASHI)</td>
<td>ASHI Inspector or Certified Inspector</td>
</tr>
<tr>
<td>Build it Green</td>
<td>Green Point Rater or Certified Green Building Professional</td>
</tr>
<tr>
<td>Building Performance Institute (BPI)</td>
<td>Building Science Principles Certificate of Knowledge</td>
</tr>
<tr>
<td>California Real Estate Inspector Association</td>
<td>CREIA Certified or Master Inspector</td>
</tr>
<tr>
<td>International Association of Certified Home Inspectors</td>
<td>Home Energy Inspector</td>
</tr>
<tr>
<td>(InterNACHI)</td>
<td></td>
</tr>
<tr>
<td>National Association of Home Inspectors (NAHI)</td>
<td>Certified Real Estate Inspector</td>
</tr>
<tr>
<td>National Association of the Remodeling Industry (NARI)</td>
<td>Green Certified Professional, Certified Remodeler, or Master Certified Remodeler</td>
</tr>
<tr>
<td>North American Technician Excellence (NATE)</td>
<td>Air Conditioning/Heat Pumps, Gas/Oil Heating, or Gas/Oil Hydronics</td>
</tr>
<tr>
<td>Residential Energy Services Network (RESNET)</td>
<td>HERS Rater</td>
</tr>
</tbody>
</table>
DOE will provide you with access to the FREE training & testing

- An Assessor candidate can take training and testing at their convenience
- No proctor or registration is required to take the test
- Unlimited access to the 3D Sim tool training scenarios
Online Training & Testing Details

Overview of the 3D Sim:

- Use Firefox or Safari browsers
- Read the Sim Instructions document and have it open when you log-in for the first time
- Make sure you read the instructions carefully before jumping into any of the Sim homes
- Takes about 10-15 hours to complete training and testing
Quality Assurance & Program Mentoring

- Once the 3-D Sim testing is complete:
  - You become a Qualified Home Energy Score Assessor
  - Frontier will confirm an Assessors’ participation status by email
  - Frontier will schedule an orientation call to review the next steps for completing your first Assessment

- For your first Assessment:
  - Frontier will arrange for a Mentor to attend your first Assessment
  - Mentor will provide feedback on data collection and data entry
  - Frontier Energy will arrange to shadow you at 1 in 20 Assessments
BayREN Pilots – Electrification Checklist

• Addendum to the HES that collects data points on electrification potential for home
  • Examples: electrical panel size, stove fuel source, location of water heater

• Learn when a home is a good fit for electrification measures

• Assessors are encouraged to recommend electric improvements when suitable

• Checklist is optional, except in the City of Berkeley

• Watch training on checklist here:
  https://www.youtube.com/watch?v=Z1VvHoc1ej4
BayREN Pilots – Post Improvement Kicker

• Eligible for any home that received a score Jan 1, 2020 and later

• Eligible improvements not limited to initial score recommendations

• PV/Solar is not an eligible improvement

• Required documentation:
  • Proof of permit (if applicable); and
  • Before and after photos; or
  • Receipt or invoice of improvement with date
BayREN Home Energy Score Rebates

• Assessors are eligible to receive $200 per home for an initial HES assessment
  • Not available in the City of Berkeley because of their Building Emissions Savings Ordinance (BESO)
  • Not available in the City of Palo Alto because they are not eligible for PUC-funded programs

• Rebate can go to Assessor or homeowner
  • Homeowner will indicate which party will receive the rebate on the rebate application form
  • Majority of rebates go to Assessor, you may discuss the option with the homeowner

• Assessors need to complete a W-9
Additional Rebates - 2021

• BayREN offers additional, limited-term rebates

• An additional $100 is available for completion of an electrification checklist
  • Only goes to the Assessor
  • Electrification checklist is required in Berkeley and therefore not eligible for the rebate

• A $100 rebate is available for re-scoring a home after energy improvements have been made
  • Only goes to the Assessor
Berkeley BESO

• Berkeley requires a Home Energy Score and electrification checklist at time of listing of a single-family home under the Building Emissions Saving Ordinance (BESO)

• More information and steps to participate:
  • Visit https://www.cityofberkeley.info/BESO/ for general BESO information
  • Visit https://www.cityofberkeley.info/BESOassessor/ for BESO assessor information
  • Contact BESO@cityofberkeley.info
  • Or we can put you in touch with program administrators
For more information on the Bay Area Home Energy Score program:

- Visit: [https://www.bayren.org/home-energy-score-assessors](https://www.bayren.org/home-energy-score-assessors)
- Email: HomeEnergyScore@frontierenergy.com

Thank you!