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California Home Energy Efficiency Rating Services (CHEERS) would like to express appreciation to the Commission for the excellent progress in this effort for completing the California Home Energy Rating System Program. As an approved HERS Provider from the time of adoption of the initial HERS Regulations, CHEERS has worked with CEC staff and other stakeholders to establish the role of HERS Raters and the function they perform in the California building industry.

It is in this context that CHEERS offers the following suggestions that we believe will help ensure consistency, uniformity, accuracy and integrity in these regulations.

- **Building Performance Contractors**<sup>1</sup>

CHEERS believes that Regulation must clearly define whether California licensing as a contractor is required for Building Performance Contractors (BPC). While this appears to be the case, reflecting the notable exception contained in Section 1673 (i)(3), it should be described more completely in Section 1671. This lack of clarity is supported by examining the details in the HERS Technical Manual, Section 8.3 (Special Requirements for Building Performance Contractors), which pertain mainly to the BPC performing the tasks of an energy auditor/rater. While specially-approved programs for training and certification of BPCs cover the health, comfort, and safety aspects of the operation of the home, the Regulation simply states that these programs "... shall provide more in-depth training in all areas specified ..." This enhanced training developed by a HERS Provider approved for a special program under this rules could actually be no different from the training provided for the Whole House Home Energy Rater.

If, as we believe the Regulation intends, that Building Performance Contractors should be licensed contractors, then it should provide clear guidance to HERS providers by specifying the allowable California Contractors State License Board (CSLB) classifications under these rules. Furthermore, we interpret that the exception to the independent entity provision in Section 1673(i)(3), as stated in the HERS Technical Manual, 8.3 (page 62) may conflict with CSLB rules as pertains to allowable activities for specialty contractors. CHEERS recommends a B General Building Contractor as the minimum classification required for Building Performance Contractors.

- **HERS Software**

CHEERS believes that even though the details contained in the HERS Technical Manual acknowledge that HERS software approval can be made independently from the other approvals in a HERS Provider's application, the

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<sup>1</sup> References to Building Performance Contractor in the 4 Day Express Terms at Section 1671 (Page 1), Section 1673 (a)(9) (Pages 8-9), Section 1673 (h)(3)(A) (Page 12), Section 1673 (i)(3) (Page 13), Section 1674 (e) (Page 16), and in the HERS Technical Manual, Section 8.2 (Pages 61-64).

Regulation should also reflect that different paths may be taken. The role of software vendors in developing these tools should also be included. Given the limited number of approved compliance software programs that we can expect at the onset of these rules, there will likely be a very interesting environment for developing, testing and qualifying HERS software. This is especially true given the expectation that HERS software can be deployed in the timeframe suggested for these rules becoming effective.

- **Measure Cost Database and Data Standards**

A major use of the HERS Program is to encourage home owners and buyers to maximize the performance of their current and prospective houses and it is important to present the benefits of investing in improvements in a consistent manner. The various data sources used in determining the impacts of energy improvements, especially the cost-effectiveness, must be reliable. One way to help ensure this is through establishing standards and formats for maintaining those sources that would be kept in the public domain.

For example, the cost of measures, incentives and other premiums that affect the California HERS Index that are used in the Standard Approach, are required to be the same for all HERS providers. A derivative, consisting of the measure cost portion of the Database for Energy Efficient Resources (D.E.E.R.) is identified as the starting point. With the expectation that this data source will be periodically updated using actual costs for various improvements obtained from HERS providers, it will be important to develop a standardized format to both initialize the starting point and ensure that HERS providers consistently capture the actual costs reported through their data systems.

However, the HERS Technical Manual discussion (Section 6.1.1; Page 53) related to maintaining the Standard Approach database is ambiguous regarding how the collaboration of the HERS providers is managed for considering changes. Rather than having individual HERS providers evaluate their own databases for possible changes and then reconcile, all providers should submit periodic measure cost reports according to a regular, fixed schedule.

This same issue applies to the other possible data sources that affect calculation assumptions, including utility rate tariffs and energy bill disaggregation matrices. Standardization should also apply to the Data Input Summary and for disclosing the details of alternative assumptions used in optional recommendations reports produced using the Custom Approach (Section 2.3).

We recommend that Energy Commission staff convene, at the earliest opportunity, a working group of stakeholders to provide guidance on developing data and reporting standards that would apply to the items described above.

Thank you for the opportunity to present these comments to this important proceeding.

Sincerely,



Robert A. Scott, Executive Director  
California Home Energy Efficiency Rating Services