

# ENERGY STAR® Partnership Agreement

For ENERGY STAR HVAC Quality Installation (QI) Program Partners



**Mail this form to:**

ENERGY STAR HVAC QI Program Manager  
US EPA (Mail Code 6202J)  
1200 Pennsylvania Ave, NW  
Washington, DC 20460

Or

**Fax this form to:**

202-343-2200

Organization Name: \_\_\_\_\_  
Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ Web Site: \_\_\_\_\_  
Major Area(s) Served: \_\_\_\_\_

Authorized Company/Organization Representative (printed name): \_\_\_\_\_  
Title: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**To be completed by U.S. EPA:**

Kathleen Hogan; Director, Climate Protection Partnerships Division, US Environmental Protection Agency

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

**ENERGY STAR HVAC QI Program Goals**

ENERGY STAR helps consumers, businesses, and public organizations protect the environment through superior energy efficiency.

The ENERGY STAR HVAC QI program seeks to improve HVAC installation practices to deliver greater energy efficiency and comfort to consumers and to provide energy efficiency program strategies to utilities.

**Note:**

- The ENERGY STAR HVAC QI Program is applicable to installations of central air conditioning (CAC) systems and air-source heat pump (HP) systems, with a rated capacity up to 65,000 BTU/H.
- Program requirements may be used for replacement systems in existing homes and for new construction. Installation requirements for new construction are more stringent than for replacement systems.
- If the home has multiple zones that require multiple HVAC systems, each system must be verified as a separate unit.
- Although the ENERGY STAR HVAC QI Program does not require contractors to install ENERGY STAR qualified equipment we strongly encourage program partners to promote ENERGY STAR qualified equipment in tandem with quality installation.

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**ENERGY STAR Commitments to Partners**

1. Increase awareness of the ENERGY STAR HVAC Quality Installation Program by distributing key messages on the benefits of proper installation practices and verification.
  2. Provide current ENERGY STAR news, information, and reference documents (via the ENERGY STAR Web site, Hotline, e-mail or other means).
  3. Provide ENERGY STAR partners with public recognition for their involvement in ENERGY STAR.
  4. Respond swiftly to any partner request for information or clarification on ENERGY STAR policies.
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For the purpose of this agreement the following terms are defined as follows:

**ANSI**

The American National Standards Institute (ANSI) facilitates the development of American National Standards by accrediting the procedures of standards developing organizations. Accreditation by ANSI signifies that the procedures used by the standards body in connection with the development of American National Standards meet the Institute's essential requirements for openness, balance, consensus and due process.

**ENERGY STAR HVAC QI Guidelines**

Requirements for installations under the program must meet the ACCA HVAC Quality Installation Specification standard or equivalent standard approved by EPA.

**Level 1 Verification**

Level 1 verification is a data review of Manual J calculations and commissioning report, and does not include in-field verification. The data review will include confirming that all required installation elements were performed using an approved method and check for data inconsistencies

**Level 2 Verification**

Level 2 verification is an in-field verification of the installation that follows established protocols.

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**Terms of the Agreement:**

The following are the terms of the ENERGY STAR Partnership Agreement as it pertains to ENERGY STAR HVAC Quality Installation (QI) Program Partners. The ENERGY STAR Partner under HVAC QI is defined as a program sponsor who agrees to the following commitments, and is legally independent from contractors performing installations and third-party verifiers verifying installations under this program.

The ENERGY STAR Partner may issue an ENERGY STAR Quality Installation Certificate for a central air conditioning (CAC) system or an air-source heat pump (HP) system, with a rated capacity up to 65,000 BTU/H, if the following criteria are met:

- 1) The participating contractor has signed a participation agreement with the ENERGY STAR Partner implementing the program.
    - a) The participation agreement between the contractor and the ENERGY STAR partner must include at a minimum:
      - i) Entry and training requirements
      - ii) Installation requirements
      - iii) Documentation requirements
      - iv) Sampling and verification requirements
      - v) A conflict resolution process
      - vi) A process for dismissal from the program if the terms of the participation agreement are not adhered to
  - 2) The CAC or HP system is installed by a technician working as or for a state licensed contractor, where a license is required.
  - 3) The CAC or HP system is verified to meet the ENERGY STAR HVAC QI Guidelines by an eligible and qualified third party verifier.
    - a) The criteria for meeting the ENERGY STAR HVAC QI Guidelines are established by:
      - i) The Air Conditioning Contractors of America's (ACCA) HVAC Quality Installation Specification or comparable ANSI-recognized, HVAC specification related to the proper installation of residential and commercial heating, ventilation, and air conditioning
    - b) To be considered eligible under the program the third party verifier must:
      - i) Be an autonomous organization/individual with no financial or ownership connections to the contractors participating in the program
      - ii) Demonstrate knowledge and ability to verify each element of the ENERGY STAR HVAC QI Guidelines
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**Terms of the Agreement (Continued):**

- 4) Sampling Rates and Verification Protocols.
  - a) The program requires that all partners meet, at a minimum, the following sampling rates on verifications, or offer an alternate verification schedule for EPA approval. All sites must receive a Level 1 verification:
    - i) Phase 1 - Level 2 verification protocols will be conducted on 3 of the first 5 installations submitted by a new contractor participant.
    - ii) Phase 2 - Level 2 verification protocols will be conducted on 20% of the next 25 installation submittals.
    - iii) Phase 3 - After successful completion of Phase 1 and 2 the partner may use Level 2 verification protocols at a rate of 5%.
  - b) A contractor is not eligible to move to the next phase, or lower sampling rate, until they can demonstrate to the Program Partner that they are consistently meeting all program requirement and technical standards.
  - c) If a contractor fails a Level 2 verification they will be required to move to a phase with a higher verification sampling rate.
  - d) All of the installations submitted to the Partner under the program must be verified using the sampling rates above.
  - e) All Installation must be verified using the verification protocols outlined in the ENERGY STAR HVAC QI Program Plan document
- 5) The Partner has submitted a detailed implementation plan to EPA describing how they will implement sections 1 through 4 of this agreement. The Partner may not proceed with the program until this plan has been approved by EPA.

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**Other Partner requirements under this agreement:**

- Provide EPA, on a quarterly basis, market indicators to assist in determining the effects of the program in promoting quality HVAC installations. EPA will only use the data for program evaluation purposes. The following data should be submitted in electronic format:
    - Number of participating contractors
    - Number of installations performed
    - Number of installations inspected
    - Number of installations failing verification
    - Number of certificates issued
    - Reasons for installation failures and the action that was taken to resolve the problem
  - Adhere to the ENERGY STAR Identity Guidelines (available at [www.energystar.gov/marks](http://www.energystar.gov/marks)) and ensure that authorized representatives, such as advertising agencies also comply.
  - Prior to use, submit all marketing materials developed for Partner's ENERGY STAR promotions to ENERGY STAR for review to ensure accuracy of ENERGY STAR logo use and consistency of the ENERGY STAR message. Partner will allow a minimum of five full working days for ENERGY STAR to review and approve ENERGY STAR aspects of the marketing materials.
  - Notify EPA of a change in the designated responsible party or contacts within 30 days.
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**General Terms and Disclaimers**

1. The partner will not construe, claim or imply that its participation in ENERGY STAR constitutes federal government approval, acceptance, or endorsement of anything other than the partner's commitment to ENERGY STAR. Partnership does not constitute federal government endorsement of the partner or its services.
  2. The partner understands that the activities it undertakes in connection with ENERGY STAR are voluntary and not intended to provide services to the federal government. As such, the partner will not submit a claim for compensation to any federal agency.
  3. The partner and ENERGY STAR will assume good faith as a general principle for resolving conflict and will seek to resolve all matters informally, so as to preserve maximum public confidence in ENERGY STAR.
  4. This agreement is voluntary and can be terminated by either party at any time or any reason, with no penalty.
  5. Failure to comply with any of the terms of this partnership agreement can result in its termination and cessation of access to the benefits of ENERGY STAR, including use of the marks.
  6. ENERGY STAR will actively pursue resolution of noncompliance related to the use of the ENERGY STAR marks.
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