

Program Sponsor Partnership Agreement For Home Performance with ENERGY STAR®



Return this form to ENERGY STAR:
HomePerformance@EnergyStar.gov
US EPA (Mail Code 6202J)
1200 Pennsylvania Ave, NW
Washington, DC 20460
FAX: 202-343-2200

Eligible Organizations: Organizations that implement a residential home improvement program that meets the criteria for Home Performance with ENERGY STAR, a joint U.S. Environmental Protection Agency and U.S. Department of Energy program.

Through this agreement, ENERGY STAR and _____ (hereafter "the Partner") agrees to work in cooperation to promote Home Performance with ENERGY STAR under the program name _____ (hereafter "the program").

Organization Name: _____
Contact Name: _____ Email: _____
Address: _____ City/State/Zip: _____
Telephone: _____ Fax: _____ Web Site: _____
Major Metro Area(s) Served: _____

Partner Commitments

The following are the terms of the ENERGY STAR Partnership Agreement for Home Performance with ENERGY STAR (HPwES) Program Sponsors. Guidance on this agreement is available at: www.energystar.gov/hpwessponsors.

A. ENERGY STAR Brand Requirements –The partner agrees to comply with ENERGY STAR branding requirements as follows:

1. Comply with current ENERGY STAR Identity Guidelines, (available at www.energystar.gov) which describe how the ENERGY STAR marks, marketing graphics, and name may be used. The Partner is responsible for adhering to these guidelines and for ensuring that its authorized representatives, such as implementation contractors, advertising agencies, and participating contractors are also in compliance. In order for the Partner to ensure compliance, the Partner must maintain a current list of authorized representatives which ENERGY STAR may request to verify compliance.
2. The Partner is responsible for the proper use of the ENERGY STAR marks, as well as the proper use of the Home Performance with ENERGY STAR marketing graphic used by participating program contractors.
3. Feature the appropriate ENERGY STAR marks(s) on Partner's Web site and in other promotional materials. To link to the Partner on the ENERGY STAR web site, the Partner must first comply with the ENERGY STAR Web Linking Policy found on the ENERGY STAR Web site.
4. Submit all Web site designs, and marketing materials, developed for the Partner's Home Performance with ENERGY STAR promotions to ENERGY STAR (using the address listed above) for review to ensure accuracy of ENERGY STAR marks used and consistency of the ENERGY STAR message. The Partner will allow a minimum of five full working days for ENERGY STAR to review and approve Web site designs and marketing materials.
5. Provide Home Performance with ENERGY STAR training to all employees who provide customer service. This training shall include: a) a description of Home Performance with ENERGY STAR, b) tips for answering questions about Home Performance with ENERGY STAR, and c) information on the economical and environmental benefits of energy efficiency.
6. Notify ENERGY STAR (using the address listed above) of a change in the designated responsible party or contacts for this agreement within 30 days.

B. Program Plan Requirements – The Partner agrees to develop and submit a Program Plan to HPwES as follows:

1. Develop and submit a program plan to implement HPwES using the Program Plan Guidance available at www.energystar.gov/hpwessponsors.
2. After the Partner submits a program plan along **with a signed Partnership Agreement**, ENERGY STAR will review them for approval. Once approved, the Partner will be listed as an ENERGY STAR Partner.
3. The Program Plan shall be updated annually to reflect the current practices of the program.

NOTE: Help on Program Plan development is available directly from HPwES support staff. To request assistance contact HomePerformance@EnergyStar.gov.

C. Program Requirements - The Partner agrees to promote whole-house evaluation and building science-based energy improvements to existing homes. The goal of HPwES is making cost-effective, energy-efficient improvements to homes. The program shall consist of the following components:

1. **Home Performance Assessment or “Test-in”.** An energy specialist trained in building science principles will perform a Home Performance Assessment (HPA) which will include a visual and diagnostic energy inspection of the home using a form standardized for the program. See HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for HPA details.
2. **Inspection Results and Recommended Improvements.** Improvements to the home will be recommended based on the initial inspection and homeowner interview. The homeowner will be given a review of the findings and provided with a summary report including:
 - a. A summary of HPA findings
 - b. Improvement recommendations
 - c. An estimation of costs for the improvements
 - d. An estimation of energy savings from implementing the recommendations.

NOTE: Recommendations for improvements will be on a fuel-neutral basis.

NOTE: See HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for details.

3. **Installation of measures.** The program will help homeowners identify qualified contractors able to implement the HPA recommendations. This can either be the participating contractor providing the inspection and recommendations or other contractors qualified in home energy inspection, building science, and proper installation techniques. All installed measures will be in accordance with industry best practices. See HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for details.
4. **Post-Installation Tests or “Test-out”.** Documentation of improvements and diagnostic testing (test-out) will be used to verify the performance of installed measures as well as to meet health and safety standards. A summary of the final tests will be given to the homeowner. The results may be in the form of a “Summary Certificate”. See the HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for details.

D. Program Quality Assurance (QA) Requirements –The Partner, either directly or through its implementation contractor, will administer a quality assurance (QA) program that meets the following minimum requirements (See HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for additional guidance on program QA):

1. All participating contractors will agree to the terms of a participation agreement established by the Partner. The terms of the contractor participation agreement will include a requirement to comply with the current ENERGY STAR Identity Guidelines and properly use the HPwES logo. All jobs performed by contractors who agree to these requirements and sign the agreement (i.e. “participating contractor”) must be reported to the Partner after a Home Performance Assessment is completed and some recommended improvements are completed.
2. All job reports will be reviewed by the Partner based on protocols established by the Partner to identify quality of service problems associated with jobs completed by participating contractors. If needed, the Partner may follow-up with a contractor or conduct an on-site inspection to verify the quality of the service provided.

3. In addition to the above, the Partner will conduct on-site inspections, at a set inspection rate, of the work of all participating contractors. The minimum on-site job inspection rate is set at 5% (1 in every 20 jobs).
NOTE: It is recommended that the Partner establish an adjustable on-site inspection rate for contractors based on job experience and performance. This inspection rate reduces as the contractor gains experience in the program and as on-site inspections show the contractor is performing well. Contractors may drop down a tier if performance slips. Here is the recommended set of tiers:
 - a. Tier 1 Contractor - The first 3-5 jobs will be inspected on-site or mentored.
 - b. Tier 2 Contractor - 20% of the next 20 jobs are inspected on-site (4 out of 20).
 - c. Tier 3 Contractor - 5% of all jobs inspected on-site (1 in 20).
4. All Partners are required to have a systematic customer feedback mechanism which allows customers to provide feedback directly to the Partner. Negative feedback must be addressed.
5. All Partners must record and track their inspections, rate of inspections, findings, and corrective actions. Records must be available for review when requested.

NOTE: HPwES is a voluntary program and QA communications with participating contractors should be delivered in a positive spirit of assistance, education and continuous improvement.

NOTE: Partners may authorize an independent entity to review reports, initiate customer feedback, follow-up on problems, perform on-site inspections, and document actions.

E. Program Data Reporting Requirements –The Partner, either directly or through it's implementation contractor, will provide ENERGY STAR (using the address listed above) with data to assist in determining the effects of the program and to ensure that QA is being performed by all Partners. (See HPwES Sponsor Guide at www.energystar.gov/hpwessponsors for additional guidance on data reporting requirements.)

1. Provide to ENERGY STAR, on a quarterly basis and in electronic format, the following minimum data:
 - a. Number and names of participating contractors
 - b. Number of completed jobs per contractor
 - c. Number of on-site inspections completed per contractor
 This information is due by April 30th for the first quarter, July 31st for the second quarter, October 31st for the third quarter, and January 31st for the fourth quarter.

***NOTE: Partners that do not submit quarterly reports will be considered inactive and removed from the ENERGY STAR web site. In addition, to remain active, the Partner must report a minimum of 50 jobs per year. A new program has 2 years to meet this requirement.**

2. In addition to quarterly reporting, an annual summary report (**due by December 15th for the current calendar year**) is required. This annual report will include at a minimum:
 - a. An annual summary of contractor recruitment/training activities,
 - b. Quality assurance activities,
 - c. Marketing activities, and
 - d. Future program plans.
 This report should be less than three pages and can be used in a Partner's application for an ENERGY STAR Award.

ENERGY STAR Commitments to Partners:

1. Increase awareness of HPwES by distributing key messages on the benefits of a whole-house approach to improving energy efficiency.
 2. Provide current HPwES 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 HPwES.
 4. Respond swiftly to any Partner request for information or clarification on HPwES policies.
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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 for any reason. Failure to comply with any of the terms of this partnership agreement can result in its termination. Termination of the partnership will result in the termination and cessation of access to the benefits of ENERGY STAR, including allowance to use any ENERGY STAR marks.
5. ENERGY STAR will actively pursue resolution of noncompliance related to the use of the ENERGY STAR marks.

To be completed by Partnering Organization

Representative with authority to commit partnering organization to the terms of this agreement

(printed name): _____

Title: _____ E-mail: _____ Phone _____

Signature: _____ Date: _____

To be completed by ENERGY STAR representative:

Jonathan Passe, U.S. EPA

Signature: _____ Date: _____
