

# Home Energy Score Partner Implementation Template

Version: 3/26/2015

**Instructions:**

1. Be as specific and detailed as possible in your responses.
2. Use this template to describe how you will deliver Home Energy Score over the next 12- 24 months
3. All fields should be completed.

## PARTNER INFORMATION

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**Name of Organization:**

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**Staff Lead for Home Energy Score:** *(Name, Organization, City, State, Phone, Email)*

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**Partner Organization serves as:**

Program Sponsor       Program Implementer       Other: \_\_\_\_\_

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**Organization type:**     State government       Utility  
                                  Local government       Non-profit organization  
                                  Other: \_\_\_\_\_

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**Funding source:**     System benefit charge     Grants  
                                  Rate recovery               Fiscal budget  
                                  Other: \_\_\_\_\_

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**Provide information about the length and source of funding for your proposed effort.**

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**Implementation contractor** (if applicable and different from Partner Organization):  
*(Name, Organization, City, State, Phone, Email)*

**Provide numeric goals for the following** (\*1st quarter of implementation, not calendar year):

	Total for 12 months	1 <sup>st</sup> Quarter*	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Home Energy Scores completed	(e.g., 550)	(e.g., 75)	(e.g., 75)	(e.g., 150)	(e.g., 250)
Qualified Assessors trained					
Conversions from Score to energy improvement job					
Energy savings (please provide units e.g., kWh, BTU, % savings)					
Other (please specify)					

**PARTNER’S EXISTING MARKET AND PROGRAMS**

1. What is your organization’s current customer base and market area? (e.g., number of homes served, locations served)

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2. What do your current residential energy efficiency programs entail?

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3. What software, if any, do you use to audit or assess homes today?

**IMPLEMENTING HOME ENERGY SCORE**

1. How do you plan to integrate the Home Energy Score into your existing programs?  
(Please provide detailed information. For example, will Home Energy Score be offered to all existing customers, some of them, on a first come/first served basis, etc.?)

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2. Do you plan to utilize the Application Programming Interface (API) to integrate the Home Energy Scoring Tool with the software tool you’re currently using or another tool?

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3. Where do you plan to offer Home Energy Score? (e.g., Chicago metropolitan area, New York)

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4. Are there any specific groups you plan to target? Exclude? (e.g., income qualified, utility customers, city residents, etc.)

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5. When do you plan to begin providing the Home Energy Score?

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  6. How many certified contractors/auditors have you identified to provide the Home Energy Score? If you need additional assessors, how will you recruit them?

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  7. What incentives, if any, will you offer to motivate contractors to provide Home Energy Scores?

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  8. Do you plan to set a price for providing the Home Energy Score or will this be contractor-driven? If the former, what price do you plan to set?

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  9. How and when will you deliver the score and supplemental information? (e.g., at the home assessment, by email, by mail, within 2 weeks of assessment)

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  10. What if any follow-up do you plan to do with customer after the home is scored?

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## **MARKETING HOME ENERGY SCORE**

1. How and how often will you market the Home Energy Score to homeowners?

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2. Will you market the Home Energy Score to other stakeholders? (e.g., realtors, appraisers, home inspectors, other) If so,how?

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## **DATA TRACKING AND REPORTING**

1. In addition to the Home Energy Score data points, are you interested in sharing other data with DOE for analytical purposes? If yes, what types of data and in what format?

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2. Do you have access to utility bills for the homes scored? If yes, covering what time period? Are you willing to share this data with DOE or its contractor?

## QUALITY ASSURANCE & QUALIFIED ASSESSORS

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1. How will you fulfill the program's Quality Assurance requirements to re-score 5% of the homes by a third party? Who will rescore those homes?  

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2. Will the homes being rescored be selected randomly? Please explain.  

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3. How do you plan to get homeowners to allow their homes to be rescored if they are selected for quality assurance purposes?  

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4. Will you review the Home Energy Scores generated by your Qualified Assessors? If yes, how?  

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5. How and how frequently will you stay in contact with your Qualified Assessors?  

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6. Do you plan to check in on new Qualified Assessors after they have scored their first 1-5 homes? If yes, how?

## PROGRAM EVALUATION

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1. How will you evaluate the program?
2. Will you evaluate customer satisfaction and/or the effect of Home Energy Score on homeowner action? If yes, how?

## ADDITIONAL COMMENTS (optional)

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Please provide any additional information you think would be useful.

**NEXT STEPS:** Submit your plan to [HomeEnergyScore@sra.com](mailto:HomeEnergyScore@sra.com) with your Partner name in the subject line and file name with the date. E.g. *Implementation Plan Missouri West 4-12-12*

*Public reporting burden for this collection of information is estimated to average six hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of the Chief Information Officer, Records Management Division, IM-23, Paperwork Reduction Project (1910-XXXX), U.S. Department of Energy, 1000 Independence Ave SW, Washington, DC, 20585-1290; and to the Office of Management and Budget (OMB), OIRA, Paperwork Reduction Project (1910-XXXX), Washington, DC 20503.*