

1. READ ME FIRST

I- About the Home Performance with ENERGY STAR Annual Report

As a Home Performance with ENERGY STAR (HPwES) Sponsor, one of your partnership commitments is to provide information on your program's performance. The U.S. Department of Energy (DOE) is interested in gathering information on CY2022 results as well as your program's compliance with Version 1.5 of the Sponsor Guide. Compliance questions will be included in the Annual Report tab of this workbook. Data analysis from this report will help support program development and growth.

Please answer the questions based on the data you normally collect and information that is readily accessible. If you do not have the information to respond to specific questions, answers may be left blank.

Supporting definitions are provided for questions marked with ^d. A complete list of all the definitions is also located in the Definitions tab. Please provide feedback to your HPwES Account Manager.

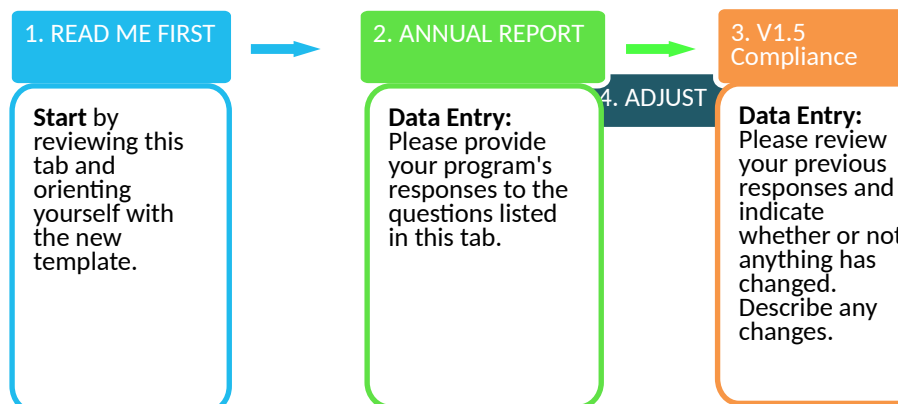
Please complete this form by Wednesday, February 18, 2023 and submit it by email to Emily.Costello@thebui.com

II- About the Annual Report Template

The response fields of questions for which information would be appreciated will appear orange.

The template is structured around 3 tabs: (1) READ ME FIRST, (2) Annual Report, and (3) V1.5 Compliance Report. When we receive the report, we request that you please do not delete tabs, change formulas, or change cell locations.

III. The Suggested Flow



IV- Supporting Definitions

Average Invoice Cost	The average total cost for a completed HPwES project including homeowner contribution. Average invoice cost is calculated by dividing the total completed project invoice costs by the number of completed projects.
Gross site energy savings	An estimate of the total change in energy consumption, consumed at the site (e.g. the related actions taken by participants in an efficiency program, regardless of why they took them). Gross site energy savings calculations do not account for factors not caused by the program (e.g. weather or building occupancy). Gross site energy savings calculations do not account for decisions such as free ridership or spillover. If needed, please see fuel conversion form for more information.
HPwES Project	Encompasses the complete work cycle in which HPwES services are provided to a customer. A completed HPwES project includes an HPA, installation of improvement measures, and a final energy audit.
Project Calculator or Worksheet	Sponsors and/or programs sometimes design a custom calculator to generate predicted energy savings and projects. Select this choice only if your calculator uses field data for inputs (rather than design data) and if your calculator accounts for interactivity of measures. If your calculator does not use field data, then select "Deemed Measure Savings" with or without interactivity as appropriate.
Whole Building Energy Modeling	The process of calculating a building's energy loads and predicting energy consumption based on such as the physical characteristics of the building and operating conditions. This process is typically done using software but may also be calculated using manual algorithms. Modeling includes whole building energy modeling and complex measure-specific calculations.

VI- Fuel Unit Conversion

<p>Some questions request estimated energy savings in MMBtu. If needed, users could use the fuel conversion formulas to the right to convert the most common fuel types to MMBtu. By providing the fuel amount in the appropriate cell in column I, the appropriate MMBtu value will be shown in column M. Users will need to copy the values and right click on paste special to paste the values only in the appropriate location in the "Annual Report" tab.</p>	From		
	kWh		MMBtu
	Therms		MMBtu
	Gallons (Oil)		MMBtu
	Propane		MMBtu

This data is being collected to understand annual Sponsor success, resources leveraged, and proposed changes supply will be used for evaluating national program impact and areas for potential program improvement.

Public reporting burden for this collection of information is estimated to average six hours and thirty minutes per reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing information. Send comments regarding this burden estimate or any other aspect of this collection of information, to Office of the Chief Information Officer, Enterprise Policy Development & Implementation Office, IM- Program 1910-5184, U.S. Department of Energy, 1000 Independence Ave SW, Washington, DC 20585; and to the (OMB), OIRA, Paperwork Reduction Project 1910-5184, Washington, DC 20503.

Notwithstanding any other provision of the law, no person is required to respond to, nor shall any person be subject with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection has a valid OMB control number.

Submission of this data is voluntary

Exp. Date: 07/31/2023

Annual Report

Provide an annual update on program activities and plans for CY2023. The 2022 Annual Report and 2021 Annual Report for this year appear in the V1.5 Compliance Report on the local, regional and national levels.

If your program does not have the data to report, please indicate the reason.

For more information, please contact the program manager.

For more information, please visit buildingpeople.com.

Report. To enable smoother data transfer once the report is submitted, please use the following information.

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ion, incentives, and other rebates.
; by the number of HPwES projects

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participated. This is the physical change in
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2. ANNUAL REPORT

Sponsor Name	Sponsor ID	Number of Completed HPwES Projects in 2022

Point of Contact (POC) Information				
	First Name	Last Name	Email	Phone
1. Primary Program POC				
2. Primary Implementer POC (if applicable)				

HPwES Program Spending		
	CY2022 Expenditures	CY2023 Budget
3. What is the annual program budget in dollars?		
4. What is the total amount spent on incentives (including consumer/contractor incentives, HPwES direct install, market-rate incentives/rebates and subsidies such as non-WAP income-eligible projects)?		

HPwES PROGRAM SAVINGS	
5. What are the program's estimated gross site energy savings for CY2022 (MMBtu)? If needed, please see fuel conversion formulas at the end of the "READ ME FIRST" tab. Reported savings should only be based on HPwES activities.	
What percentage of the total energy savings were electric savings?	
What percentage of the total energy savings were thermal fuel savings?	
6. How are energy savings estimated at the project level?	
If using software, which program(s)?	
7. What are the average per-project % energy savings?	

HPwES PROGRAM DESIGN and RESULTS		
8. Please estimate the percentage of HPwES projects completed in CY2022 that included each of the measures to the right. Note: Any projects with associated measures completed before or after 2022 are not captured. Your estimates will aid the HPwES Team in roughly identifying the measure mix for 2022 completed HPwES projects.	Shell/Envelope	
	HVAC Repair/Replacement	
	Smart Thermostats & Technologies; SHEMS	
	Duct Sealing/Repair/Replacement	
	Duct Insulation	
	Water Heating Equipment	
	Lighting	
	Ventilation Upgrades	
	Appliances	
Other, please specify		
9. What is the average project invoice including homeowner contribution and rebates?		
10. How many income-qualified projects were completed during 2022?		
11. How many multifamily units were completed during 2022? See page 32 of the Sponsor Guide (https://www.energystar.gov/ia/home_improvement/downloads/HPwES_Sponsor_Guide_v1-5.pdf) for guidance on multifamily reporting.		
12. Does your program offer homeowner financing?		

Quality Assurance

13. What is the QA field inspection sampling rate? (%)

General Program Information

14. Please provide below a summary of program activity in 2022, including highlights of key accomplishments, program enhancements and any major program design changes made or planned.

15. Please provide below a summary of challenges or barriers encountered in 2021, including external factors impacting the program (e.g., DSM budgets, workforce/labor shortages, energy costs, etc.)

16. Please provide below a summary of whether the program met its goals for the year (if applicable), and describe plans, including any goals (retrofits, energy savings, and consumer engagements, for example) for the following year.

QUESTION

1. Describe how your program's Home Performance Assessment d incorporates the following elements:

- Customer interview
- Review of energy bills, if available
- Visual inspection of the home, interior, and exterior
- Minimum diagnostic tests
- Data collection of building assemblies and mechanical systems

2. Describe what is included in your program's HPA Summary Report. For v1.5 compliance, the following elements should be addressed in a HPA Summary Report:

- General customer information
- Description of existing conditions
- Prioritized list of the proposed recommended improvements
- Notice of health and safety related issues
- Savings projections

3. Describe how your program's measure installation specifications include, at minimum, the following elements:

- Acceptable sequence of installation with consideration for customer needs
- Compliance with local building codes, permitting procedures, industry-accepted standards, and manufacturer's specifications for the materials and equipment being installed
- Ventilation requirements as prescribed by industry-accepted standards
- Materials and installation techniques consistent with a building science-based approach
- Installation worker qualification criteria

4. Describe your test-out procedures and how it includes the following:

- Visual inspection of installed measures as specified in the SOW, review of commissioning reports, and diagnostic tests as necessary to confirm that manufacturers' specifications and industry-accepted standards have been satisfied
- Combustion safety checks for all projects where improvements might impact combustion appliance performance
- Blower door tests when measures impacting infiltration rates are installed

5. Describe how your Contractor Participation Agreement (CPA) includes at minimum:

- Explanation of the agreement
- Participating contractor commitments
- Marketing and advertising guidelines
- Business Practices
- Qualifications and credentials
- Terms and conditions pertaining to termination

6. Does your program provide training about the value and minimum requirements of HPwES to all participating contractors and employees who provide customer service?

7. What method does your program use to enroll participating contractors who meet the qualifying criteria?

8. Describe how the qualifying criteria and enrollment process for participating contractors in your program include the following elements:

- Training and credentialing requirements
- Certification of supervisory staff
- Ensuring participating contractors have capacity and resources to provide program related services
- Compliance with local registration and licensing requirements
- Access to qualified installation crews and/or sub-contractors

9. Describe how the program evaluates participating contractor performance and how often feedback is given.

10. Which of the following Quality Assurance options will your program adopt in the coming calendar year?

- OPTION 1: Meet minimum requirements for Quality Control
- OPTION 2: Implement a Quality Management System

11. Explain how your program's Quality Assurance plan complies with Section 6 of the Sponsor Guide V1.5, as it relates to:

- A mechanism for customer feedback
- Procedures for conflict resolutions
- Procedures for on-site inspection
- Procedures for due process and remedial actions

12. Describe how your program uses the Home Performance with ENERGY STAR brand and name in your marketing efforts.

13. Does your program maintain a list of authorized representatives, including participating contractors, who may use the brand and mark in compliance with the ENERGY STAR Brand Book?

3. V1.5 Compliance Supplemental

RESPONSE FROM 2021 ANNUAL REPORT

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JD BUDGET CONTROL NUMBER: 1910-5184

CHANGES IN 2022?	DESCRIPTION OF CHANGES, IF APPLICABLE

