



RESNET's QA Restructuring – A Utility Program Perspective

With thanks to...

Terry Smith, MaGrann

Rick Gazica, ICF

Kathy Greely, PSD

Ben Adams

VP Program Development

MaGrann Associates

benadams@magrann.com

What is Utility Program QA?

Approaches (in order of frequency):

- ▶ Independent
 - By a third party implementation contractor
- ▶ Internal
 - By utility resources
- ▶ “Market based”
 - By Provider/RESNET (standard process)

What is Utility Program QA?

Typical Methodology (for 3rd party or utility internal):

- ▶ 100% “administrative” review
 - Enrollment
 - Incentive application
 - Rating file
- ▶ Sampled file review (5-10%)
 - Rating file
 - May require supporting documentation (e.g. checklists)
- ▶ Sampled field inspection (5-10%) may include:
 - Pre-drywalls as well as finals
 - Shadow and/or blind verification
 - Supporting documentation (e.g. checklists)
 - “Reconstruction” of rating, including testing

What Do They See?

A lot of really great work by dedicated professionals, but also...

- ▶ Commoditization
 - No time for raters to act as consultants
- ▶ Thresholds vs. scale
 - ENERGY STAR, code vs. HERS score, TRM
- ▶ Inexperience
 - Skills take time, training and mentoring to develop
- ▶ Challenges to a “Credible threat of Discovery”
 - Continuous vs. periodic
 - Scheduled vs. blind

Why Utilities Care

- ▶ Confidence in savings
 - Regulation
 - Realization rate
 - Revenue
- ▶ Fiduciary responsibility
 - Ratepayer \$

How Will Restructuring Help?

- ▶ Conflict of interest
 - Discomfort with self-verification
- ▶ Consistency
 - Standardized process and procedures fit with programmatic objectives
- ▶ Competition
 - A more level playing field & a raised bar
- ▶ Customer service
 - Builder and homeowner satisfaction

Substitution

- ▶ RESNET for Utility QA
 - Still only a step in the right direction
 - More likely if trend towards robustness continues
 - ...and if EEP obligations cover all critical elements
- ▶ Utility QA for RESNET
 - Seems logical
 - But unlikely due to chain of liability

Potential Next Steps

- ▶ What can RESNET learn from the utility experience?
 - Access & agreements
 - Logistics & cost
 - Feedback loops
- ▶ Rater registry as a tool?
- ▶ File review collaboration?
- ▶ Input into continued refinement of standards

