



**Residential Energy Labeling and Scorecards:  
Roundtable to Discuss Strategies for Scalability**

**Organizing Host: National Association of State Energy Officials (NASEO)**

**Tuesday, February 9, 2016**

Meeting: 8:00 a.m. – 11:45 a.m. (please arrive by 7:45 a.m.)

***Invitation Only***

**Location:**

Fairmont Hotel, 2401 M Street, NW, Washington, DC Room: Ballroom II

**Background**

Over the past seven years, NASEO and its members have lead the way as residential energy labeling has gained significant momentum. NASEO first convened State Energy Offices, U.S. Department of Energy (DOE), and other stakeholders to discuss the unique challenges of designing and implementing multiple residential energy labeling programs in 2014, resulting in this [report](#). Parallel to those efforts, NASEO completed a multi-state [project](#) with the State Energy Offices in Alabama, Massachusetts, Virginia, and Washington to implement home energy labeling programs, including residential scorecards.

Thanks, in part, to these efforts, uptake in these types of programs has greatly increased. Today, roughly ten states now have some type of home energy labeling/disclosure policy in place that addresses new homes and/or existing homes. Several dozen states or local jurisdictions have launched residential energy labeling pilot projects. These pilots have utilized a variety of energy scorecards, including the Energy Performance Score (EPS), the U.S. Department of Energy (DOE) Home Energy Score, the Home Energy Rating System (HERS) Index, scorecards developed by local governments and non-profit organizations, and scorecards developed by utilities. There have been diverse approaches taken in terms of the energy scorecard layout, metrics included, underlying modeling approach, and data-collection requirements. Several pilot projects based in local jurisdictions have catalyzed conversations at the state level regarding a common, statewide approach to residential energy labeling.

The increased activity, varying regulatory climates, and diverse approaches at the local, state, and national levels create a difficult landscape for states that are considering development of a residential scorecard program. For these reasons, NASEO is reconvening interested parties in order provide updates on progress made in this space, uncover new or evolving challenges, and discuss how to sustainably and strategically advance residential energy labeling while aligning with existing state policy goals and energy efficiency programs.

## **The Opportunity**

NASEO intends for this meeting to support and advance labeling activities through a discussion among states and other key stakeholders involved in residential energy labeling. This gathering will focus on hearing from a number of states, some in greater detail, that are active in residential energy labeling in order to identify short- and medium-term strategies and challenges regarding how to advance energy labeling in a more-coordinated fashion across the country. Coordination also directly aids in the sharing of best practices and lessons learned. On-going collaboration among states and stakeholders will be required to achieve greater scale while recognizing the inherent commonalities and variances among states.

## **Goals for the Meeting**

The overarching goals of the meeting are to:

1. create a forum for states to share updates on their approaches to, and implementation of, residential energy labeling with one another and other key stakeholders;
2. discuss states' perspectives on the steps for developing a long-term strategy for scalability for residential energy labeling in their state;
3. identify and discuss barriers to long-term scalability for energy labeling, such as differences in labeling new vs. existing homes, data and policy challenges, evaluating cost-effectiveness of labeling programs, and linking energy labels with multiple listing services (MLS) or other real estate transaction tools;
4. begin to identify the types of standards needed across various energy labeling efforts, such as how metrics and labels are calculated, generated, delivered, stored, and made available to the public; and
5. develop a sense of next steps that this group or others could take in order to further collaboration and address challenges to advancing and scaling residential energy labeling.

## **Reiteration of Purpose**

Several meeting participants have asked clarifying questions about the purpose of the meeting. NASEO does not intend this meeting to result in a consensus agreement regarding how states and other organizations represented should proceed with their energy labeling efforts. Furthermore, the purpose of this meeting is not to establish a coordinated residential energy labeling effort among the meeting participants. The goals listed above summarize the purpose of this meeting. NASEO believes that by hearing from state energy officials regarding their energy labeling efforts and concerns, all meeting participants will be better informed regarding state and market needs. While acknowledging that it is unlikely that any formal commitments will be made at this time, we also hope that the meeting participants can identify potential points of shared interest or collaboration which NASEO can facilitate.

### **Meeting Participants**

Joan Glickman, U.S. Department of Energy  
David Terry, National Association of State Energy Officials  
Jeff Genzer, National Association of State Energy Officials  
Christian Williss, Colorado Energy Office  
Warren Cook, Oregon Department of Energy  
Corey Vezina, U.S. Department of Energy  
Emily Levin, Vermont Energy Investment Corporation  
Rachel Cluett, Amercian Council for an Energy-Efficient Economy  
Robert Sahadi, Institute for Market Transformation  
Elizabeth M. Grimes, Alabama Department of Economic and Community Affairs, Energy Division  
Trish Jerman, South Carolina Office of Regulatory Staff, Energy Office  
Anne Stephenson, Efficiency Maine  
Kelly Bragg, West Virginia Division of Energy  
Todd Currier, Washington State University Energy Program  
David St. Jean, U.S. Department of Energy  
Meredith Tunick, Bosch  
Laura Stukel, Elevate Energy  
Richard Faesy, Energy Futures Group  
Curt Rich, North American Insulation Manufacturers Association  
Carolyn Sarno, Northeast Energy Efficiency Partnership  
Bruce Mast, Build It Green  
David Heslam, Earth Advantage  
Rachel Gold, Rocky Mountain Institute  
Dale Hoffmeyer, U.S. Department of Energy  
Arah Schuur, Massachusetts Department of Energy Resources  
Rick Minard, New Hampshire Office of Energy and Planning  
Barbara Cesaro, Rhode Island Office of Energy Resources  
David Bracht, Nebraska State Energy Office  
Matt Malinowski, ICF  
Lisa Smith, Maine Governor's Energy Office

Hannah Green, Center for Sustainable Energy  
Andrew McCallister, California Energy Commission  
Michael Furze, Washington State Energy Office  
Brian Lenaghan, Washington Gas & Light  
Amber Gray, Wisconsin State Energy Office  
Maria Redmond, Wisconsin State Energy Office  
Todd Sims, National Association of State Energy Officials

## Meeting Agenda

### 1. Overview of Meeting and Participant Introductions (8:00 a.m. – 8:15 a.m.)

- a. Welcome and Opening Remarks
  - i. **David Terry**, Executive Director, NASEO
  - ii. **Todd Sims**, Program Manager, NASEO
- b. Review of meeting agenda and goals.
- c. Brief Introductions
  - i. Name
  - ii. Position/Affiliation

### 2. Where Are We Now? (8:15 a.m. – 9:45 a.m.)

- a. Detailed presentations from three states on how their residential energy labeling efforts have evolved over the past several years:
  - i. **Christian Williss**, Director of Programs and Initiatives, Colorado Energy Office
  - ii. **Warren Cook**, Manager, Energy Efficiency & Conservation, Energy Planning & Innovation, Oregon Department of Energy
  - iii. **Emily Levin**, Manager, Consulting-Program Strategies, Vermont Energy Investment Corporation
  - iv. Questions and Answer
- b. Lightning Round: All state energy offices (and other meeting participants) are invited to share a brief summary of their engagement with residential energy labeling.

### 3. Related News (9:45 – 10:15)

- a. **Joan Glickman**, Senior Advisor, U.S. Department of Energy
- b. **Laura Stukel**, Home Energy Information Accelerator

### 4. Break (10:15 a.m. – 10:30 a.m.)

### 5. Where Do We Want to Go? (10:30 a.m. -11:10 a.m.)

- a. State discussion of priorities and long-term goals
- b. Identification of current challenges and potential long-term barriers to widespread adoption of residential scorecards
  - i. What is the value to a multi-state approach to home energy labeling, residential scorecards, and other relevant issues?
- c. Questions to consider:
  - i. What are the advantages/disadvantages of having different scorecards in state/regional/national markets?
  - ii. How does scoring/labeling fit into other state energy, environmental, and economic development goals?
  - iii. What is the value to a multi-state approach to home energy labeling, residential scorecards, and other relevant issues?

- iv. How can we effectively link scorecards for new-home construction with scorecards for existing homes?
- v. What data storage and interoperability needs do we have now/will we have in the next decade?
- vi. Do we need common standards for the metrics or other elements displayed on energy scorecards?

**6. Synthesis and Next Steps (11:10 a.m. – 11:45 a.m.)**

- a. Identify any areas of common interest or potential collaboration that the group has uncovered.
  - i. Are groups/organizations already working on these priorities?
  - ii. Would a NASEO Buildings Committee Task-Force help address specific hurdles? Or is it duplicative?
- b. Identify key questions or issues that need additional thought or research in order to be addressed.
  - i. Are there any forums/initiatives that currently exist that could help address these issues?
- c. Are there any additional stakeholders/organizations that need to be part of the conversation?
- d. Are there any potential commitments participating organizations want to discuss?