

The Glide Path to Success

From Energy Code Verification to Ratings and Beyond

Presenter:

Mike Turns

Performance Systems Development

2018 National RESNET Conference Wednesday, February 28 Orlando, FL



Programs



- ✓ Design
- ✓ Implementation
- ✓ Marketing
- √ QA/QC

Professional Services



- √ Technical Consulting
- ✓ Training
- √ Energy Engineering
- √ Rater Providership

Software



- **✓** TREAT
- √ Field tools
- ✓ Program Management **Applications**
- √ M&V



- US DOE Residential Energy Code Field Study (Pennsylvania)
- DEP/PCCA Energy Code Training (PA)
- NYSERDA (New York) Energy Code Training
- Massachusetts Codes and Standards Compliance and Support Initiative



- Energy code overview/Rater opportunities
- Education of and communication with code officials
- Providing the right documentation



Homes receiving HERS Ratings in 2017:

$$\sim$$
227,840 (18%) ¹

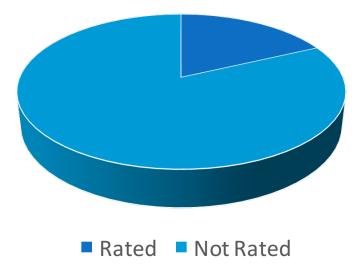
Homes NOT receiving HERS Ratings:

$$>1,036,260 (82\%)^{1}$$

Homes required to meet code:

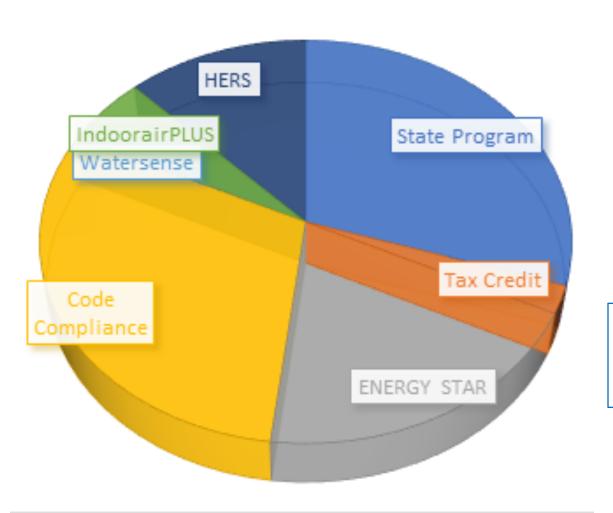
$$1,264,100 (100\%)^{1}$$

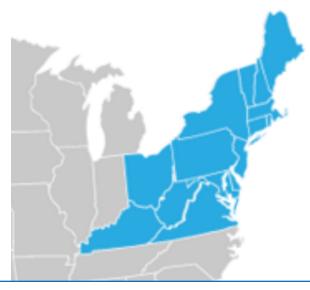
¹Includes all multifamily. For SF only, 28% rated, 72% not rated.





2017
WHY RATINGS ARE HAPPENING



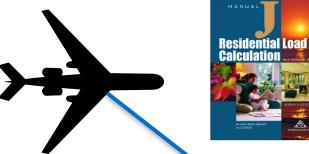


- MA Stretch Code
- Long Island Stretch Code
- IECC 2009 through 2015

The Glide Path – Codes to Passive House



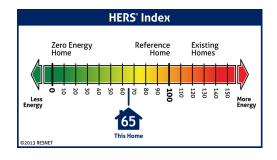








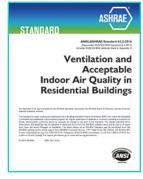
















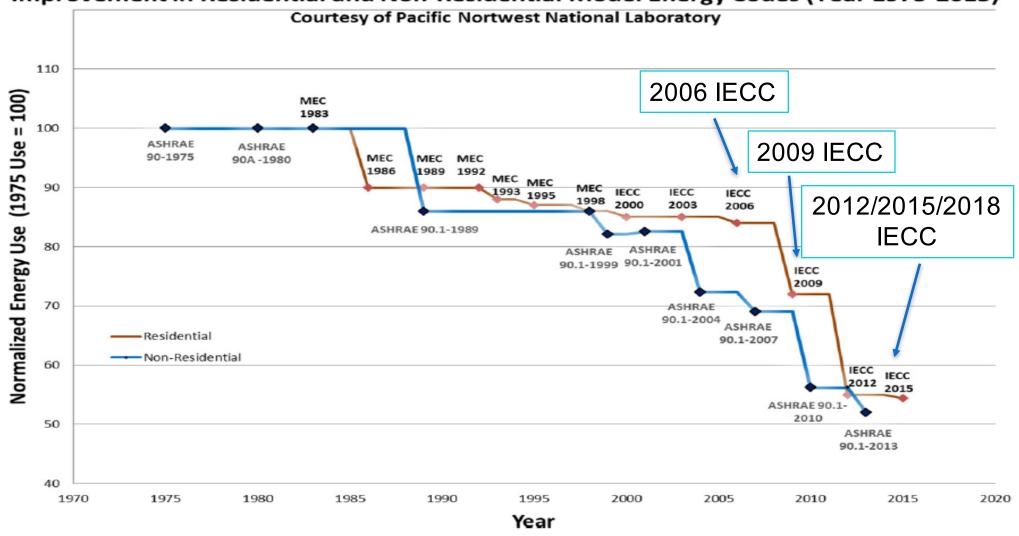




Model Codes through Time

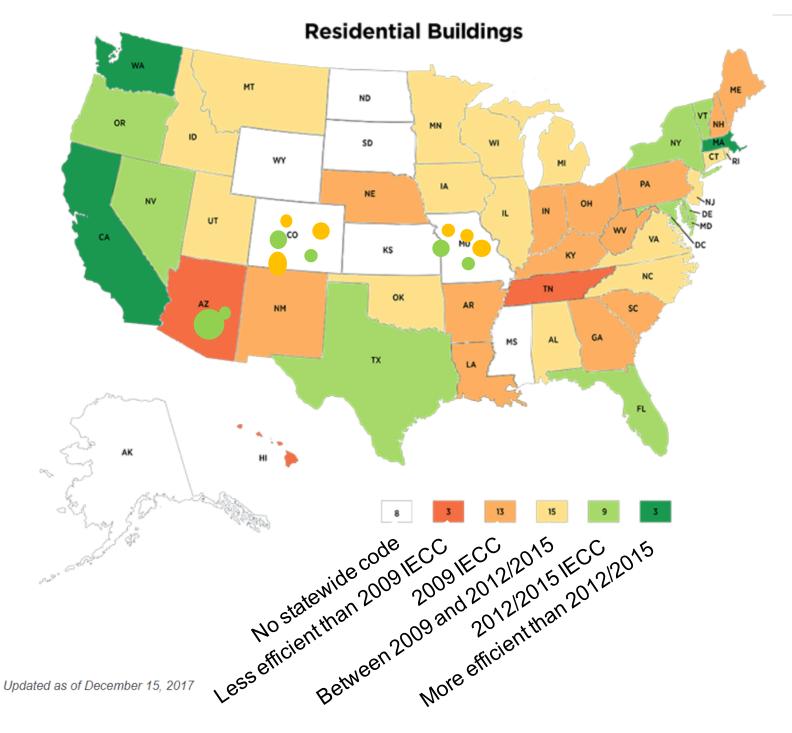


Improvement in Residential and Non-Residential Model Energy Codes (Year 1975-2015)



Code Adoption Status by State





Performance-Related Code Requirements - Timeline



2006 > 2009 > 2012 > 2015 > 2018

- Air sealing list
- UA Tradeoff
- Equipment sizing/select
- Simulated
 Performance
 Alternative

- Above-code programs
- UA Tradeoff
- Equipment sizing/select
- Blower door (optional)
- Air sealing & insulation criteria
- Duct testing
- Simulated Perf. Alt.

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- UA Tradeoff
- Equipment sizing/select
- Blower door (mandatory)
- Air sealing & insulation criteria
- Wholehouse vent.
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- Energy Rating Index Path

- Above-code programs
- UA Tradeoff
- Equipment sizing/select
- Blower door (mandatory)
- Air sealing & insulation criteria
- Wholehouse vent.
- Duct testing
- Simulated Perf. Alt.
- Energy Rating Index Path (easier)



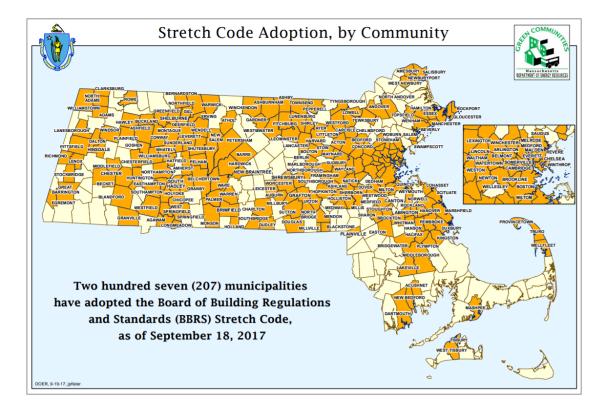


- Blower door testing standards referenced changes 2015 to 2018
- Credentials for blower door testing
 - Where required by the code official, testing shall be conducted by an approved third party.
 (2012/2015/2018)
- Credentials for duct leakage testing
 - No code language (2012/2015/2018)

What is a Stretch Code?



- A "stretch" or "reach" code allows progressive municipalities or jurisdictions to adopt more stringent energy codes within a larger jurisdiction
- Often similar to the next version of code
- ENERGY STAR, additional prescriptive requirements, HERS Index option
- Prep the market, drive savings, allow trade offs





Massachusetts

- An energy rating index ("ERI") approach
 - Certified RESNET HERS rating (HERS 55)
 - Certified Energy Star Homes, Version 3.1
 - Certified Passive House

Know Your State and Local Codes



- Statewide code vs. home rule
- Statewide amendments
- Local amendments
- Stretch codes







Home Rule







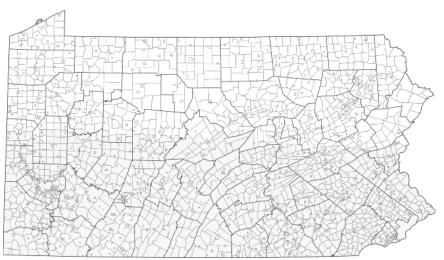
Statewide code:

Uniform Construction Code

Local enforcement:

Uniform compliance?







Understanding the IECC

And Where Rater Service Are Needed



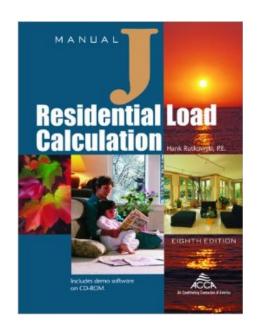
IECC 102.1.1. Above code programs.

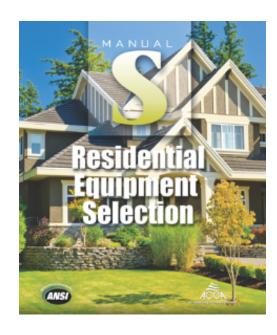
- The code official shall be permitted to deem national, state or local energy efficiency program to exceed this code
- Buildings approved in writing by such a program shall be considered in compliance with this code
- "Mandatory" requirements shall be met

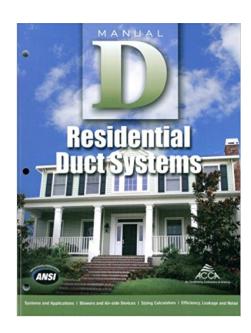


IECC 403.7

• Equipment selected per Manual S, based on calculations performed using Manual J







IRC Chapter 14







IECC 402.4 Air Leakage

• Building envelope air tightness and insulation installation shall be demonstrated by:

Blower door test

Visual inspection

2009: One or the other

2012: Both

2015: Both

2018: Both

Know the Code – Building Envelope Leakage Limits

RSTML 1090 of NO21 2015 2018 2012 **Climate zones 1-2:** 5 ACH50 Climate zones 3-8: 3 ACH50

2009



7 ACH50



IECC 402.4 Air Leakage

- Blower door testing credentials
 - ...shall be demonstrated to comply...(2009)
 - Where required by the code official, testing shall be conducted by an *approved third party* (2012/2015/2018)

Know the Code – Air Barrier and Insulation Inspections



AIR BARRIER AI	TABLE 402.4.2 ND INSULATION INSPECTION COMPONENT CRITERIA			
COMPONENT	CRITERIA			
	sterior thermal envelope insulation for framed walls is installed in substantial contact and continuous alignment with building envelope air barrier.			
Air barrier and thermal barrier	Breaks of Air-perm Air-perm	External envelope insulation for framed walls is installed in substantial contact and continuous alignment with building envelope air barrier		
Ceiling/attic	Air barrie gaps are: Attic acc Air barrier and thermal barrie			
Walls	Corners a Junction			
Windows and doors	Space be			
Rim joists	Rim joists are insulated and include an air barrier.			
Floors (including above-garage and cantilevered floors)	Insulation is installed to maintain permanent contact with underside of subfloor decking. Air barrier is installed at any exposed edge of insulation.			
Crawl space walls	Insulation is permanently attached to walls. Exposed earth in unvented crawl spaces is covered with Class I voverlapping joints taped.	posed earth in unvented crawl spaces is covered with Class I vapor retarder with		
Shafts, penetrations	Duct shafts, utility penetrations, knee walls and flue shafts open uncondi	ing to exterior or		
Narrow cavities	Batts in insulation	Showers and tubs on exterior walls have		
Garage separation	Air seal			
Recessed lighting	Recesse Excepti Shower/tub on exterior wall	insulation and an air barrier separating them from the exterior wall		
Plumbing and wiring	Insulati and plu	TOTALIC CALCITOT WAIT		
Shower/tub on exterior wall	Shower from the exterior wall.			



• IECC 402.4.1.1 Air leakage - Installation

- Where required by the code official...
 - An approved party independent from the installer of the insulation shall inspect the air barrier and insulation (2009)
 - An *approved third party* shall inspect all components and verify compliance (2012/2015/2018)



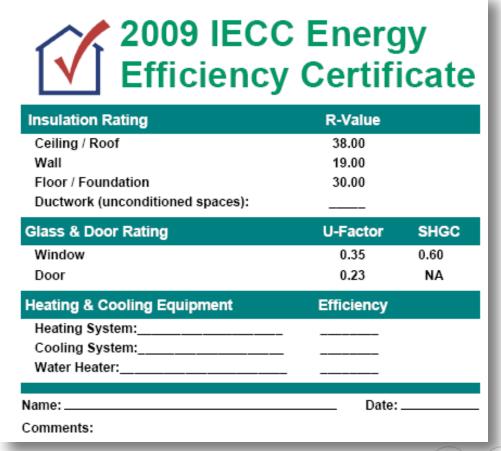
Maximum CFM25 per 100 sq. ft. conditioned floor area

	2009	2012	2015	2018		
Post-construction test						
Leakage to Outdoors	8	NA^1	NA	NA		
Total Leakage	12	4	4	4		
Rough-in test						
Total Leakage	6	4	4	4		
Total w/o air handler	4	3	3	3		

¹Leakage to outdoors option eliminated.



• Use building envelope tradeoffs to help builders find cost-effective solutions







IECC Section 405

Energy Cost Reference
Design

Energy Cost Proposed
Design

- Thermal envelope tradeoffs
 - Air tightness credit
 - Duct tightness and insulation credit
- Basically a Rating choose a different report

RESNET Accredited IECC Performance Verification Tools (not a code requirement)



Ekotrope, HERS Module v2.0

Ekotrope

Website: ekotrope.com

Date of Expiration: December 31, 2016

IC3 v4.01

Energy Systems Laboratory

Website: ic3.tamu.edu/

Date of Expiration: December 31, 2016

Right-Energy® IECC

Wrightsoft Corporation

Website: www.wrightsoft.com

Date of Expiration: December 31, 2016

EnergyGauge® USA V 5.0

Florida Solar Energy Center

Website: www.energygauge.com/usares

Date of Expiration: December 31, 2016

REM/Rate REM/Design 14.6.2

NORESCO

Website: www.remrate.com

Date of Expiration: December 31, 2016



	2015	2018	
Climate Zone	Energy Rating Index		
1	52	57	
2	52	57	
3	51	57	
4	54	62	
5	55	61	
6	54	61	
7	53	58	
8	53	58	



- 2015
 - Verification by an approved third party
- 2018
 - Verification by an approved third party
 - ERI shall be determined in accordance with RESNET/ICC 301
 - Building thermal envelope not worse than 2009 IECC prescriptive
 - When using on-site renewables, building thermal envelope not worse than 2015 prescriptive



Educating the Code Official



- HERS Raters are not Code Officials
- Code Officials are not HERS Raters
- Acknowledge this
- You are a resource for code officials
 - They see you as an energy expert, call you for advice
 - The code official is happy to have that
- The code official is a resource for you, and can be an advocate for you



- Sometimes you will disagree about a requirement or standard
- The Code Official is the emperor of their own territory, what they say is right
- Don't challenge that
- It might be different than what another code official says a town over
- What Helps?
 - Ask "Can you tell me where that's written in the standards?"
 (MA)
 - Ask for their interpretation of a specific standard (PA)
 - Inform them of what you can do, or what you've seen done in other places (NY)
 - Get creds, and show them (They want a certificate or credential, HERS Rater, ICC verifier)



- IBTS/Cadmus/PSD pilots
 - 3 residential trainings/info gathering
 - Open to 3rd-party energy pros?
- Energy Code Field Study
- Code officials:

psdconsulting.com

- Were generally OK with concept
- Want trusted credentials
- Want standardized documentation

psdconsulting.com



- The code official may see the rater as a threat, taking some of their job
 - This is rarely the case in our experience
 - The code officials are BUSY and are often not paid on a per inspection basis
 - They may not understand how to meet a criteria ("appropriate" certification or document)
- The code official may not want to deal with the HERS Rater
 - Let them know how you can help
 - They may have to deal with you anyway



- Not all alike
- Be sensitive to job security/turf issues
- Top priorities: Life + health + safety
- Energy Many site lack of time and resources
 - Raters can help



- Have conversations with heads of building departments or an ally within the dept.
 - When are energy inspections and testing required, benefits, cost(?)
 - Refer to specific code sections
 - Show examples of documentation (ACH50, CFM25, inspection checklist, IECC performance report)
 - Lay groundwork for ERI Path



Other ideas:

- Attend energy code trainings in your area and network with code officials
- Join your local ICC chapter and attend events
- Give seminars for building department staff and ICC chapters



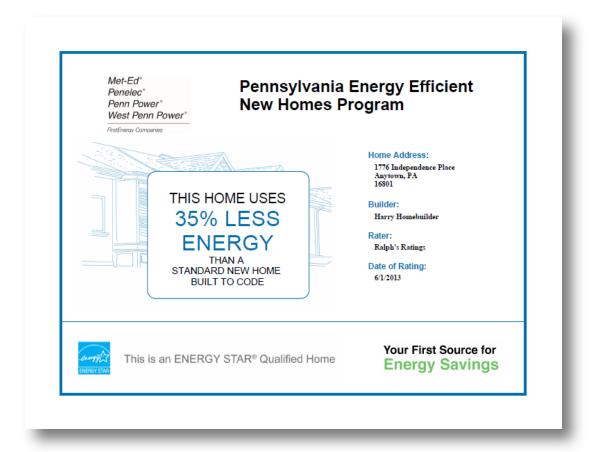
Providing the Right Documentation



- What is the code official looking for?
 - Do they already have standard forms?
 - Any specific info not directly spelled out in the code?
- If they don't know, give them examples



- Certificate
- Signed checklist of "mandatory" items





2009 IECC Certificate

124 Rater Way, Herstown, PA 06053

Building Envelope Insulation

Ceiling NA
Above Grade Walls R-29.0
Foundation Walls NA
Exposed Floor NA

Slab R-10.0 Edge, R-0.0 Under Infiltration Htg: 5.10 Clg: 5.10 ACH50

Duct NA

Duct Leakage to Outside 32.00 CFM @ 25 Pascals

Window Data U-Factor SHGC
Window 0.310 0.400

Mechanical Equipment

HEAT: Fuel-fired air distribution, Natural gas, 96.5 AFUE.

COOL: Air conditioner, Electric, 14.2 SEER.

DHW: Conventional, Natural gas, 0.91 EF, 6.0 Gal, R-10

wrap.

Builder or Design Professional

Signature

REM/Rate - Residential Energy Analysis and Rating Software v14.6.2.1

Home Energy Rating Certificate



Home Energy Rating Certificate

Property

Rating Type: Confirmed Bary Better Ratine Date: 1/22/2014

Registry ID:

Certified Energy Rater: Herby Rate

Rating Number:

Herstown, PA 06053

124 Rater Way

HERS Index: 60

General Information				
Conditioned Area	643 sq. ft.	House Type	Apartment, inside unit	

Conditioned Volume 5204 cubic ft. Foundation Slab

Bedrooms 1

Mechanical Systems Features

Fuel-fired air distribution, Natural gas, 96.5 AFUE. Heating:

Air conditioner, Electric, 14.2 SEER. Cooling:

Water Heating: Conventional, Natural gas, 0.91 EF, 6.0 Gal, R-10 wrap.

Duct Leakage to Outside 32.00 C FM25.

Ventilation System Exhaust Only: 34 cfm, 3.8 watts.

Programmable Thermostat Heat=No; Cod = No

Building Shell Features

Ceiling Flat	NA	Slab	R-10.0 Edge, R-0.0 Under
Sealed Attic	NA	Exposed Floor	NA.
Vaulted Ceiling	NA	Window Type	U-Value: 0.310, SHGC: 0.400
Above Grade Walls	R-29.0	Infiltration Rate	Htg: 5.10 Clg: 5.10 AC H50
Foundation Walls	NA	Method	Blower door test

Lights and Appliance Features

Percent Interior Lighting	100.00	Range/Oven Fuel	Electric
Percent Garage Lighting	0.00	Clothes Dryer Fuel	Natural gas
Refrigerator (kWh/yr)	408	Clothes Dryer EF	2.67
Dishwasher Energy Factor	0.46	Ceiling Fan (cfm/Watt)	0.00

Estimated Annual Energy Cost			
Use	MMBtu	Cost	Percent
Heating	3.0	\$32	7%
Coding	4.0	\$32	7%
Hot Water	1.8	\$36	8%
Lights/Appliances	11.4	\$2.22	50%
Photovol taics	-0.0	\$-0	-06
Service Charges		\$120	27%
Total	20.2	\$443	100%

Criteria

This home meets or exceeds the minimum criteria for the following: 2009 International Energy Conservation Code

Performance Systems Development

124 Brindley Street

Ithaca, NY 14850

Certified Energy Rater:

REM/Rate - Residential Energy Analysis and Rating Software v14.6.2.1

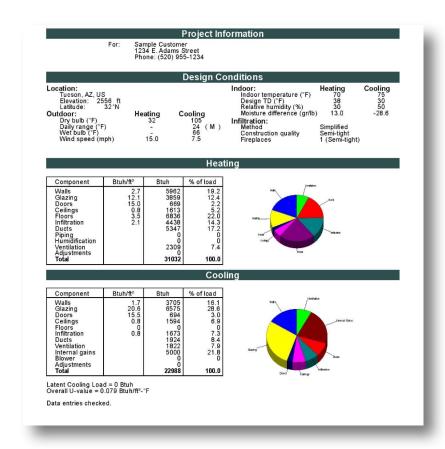
This information does not constitute any warranty of energy cost or savings. @ 1985-2015 Noresco, Boulder, Colorado. The Home Energy Rating Standard Disclosure for this home is available from the rating provider.



Documentation – Equipment Sizing/Selection



Manual J and S reports









IECC 402.4.1.2

- Documentation for blower door test
 - A written report of the results of the test shall be signed by the party conducting the test and provided to the code official. (2012/2015/2018)

IECC403.2.2

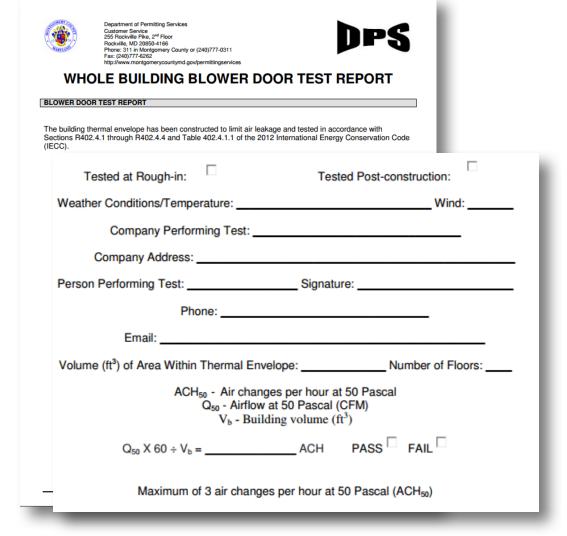
- Documentation for duct leakage test
 - A written report of the results of the test shall be signed by the party conducting the test and provided to the code official (2015/2018)

Documentation – Blower Door Testing



Recommended data:

- ACH50
- CFM50
- Conditioned volume
- Pass
- Name/signature



Documentation – Air Barrier and Insulation Inspection



Air Barrier and Insulation Inspection Checklist (Table 402.4.2)

Component	Criteria	Complies	Does not Comply
	Exterior Thermal envelope insulation for framed walls is installed in substantial contact and continuous alignment with building envelope air barrier.		
Air barrier and thermal barrier	Breaks or joints in the air barrier are filled or repaired.		
	Air-permeable insulation is not used as a sealing material.		
	Air-permeable insulation is inside of an air barrier.		
Ceiling/attic	Air barrier in any dropped ceiling/soffit is substantially aligned with insulation and any gaps are sealed.		
Constant Con	Attic access (except unvented attic), knee wall door, or drop down stair is sealed.		
Walls	Corners and headers are insulated.		
Wall	Junction of foundation and sill plate is sealed.		
Windows and doors	Space between window/door jams and framing is sealed.		
Rim joists	Rim joists are insulated and include an air barrier.		
Floors (including above- garage and cantilevered	Insulation is installed to maintain permanent contact with underside of subfloor decking.		
floors)	Air barrier is installed at any exposed edge of insulation.		
[Unvented]	Insulation is permanently attached to walls.		
Crawl space walls	Exposed earth in unvented crawl spaces is covered with Class I vapor retarder with overlapping joints taped.		
Shafts/penetrations	Duct shafts, utility penetrations, knee walls, and flue shafts opening to exterior or unconditioned space are sealed		
Narrow cavities	Batts in narrow cavities are cut to fit, or narrow cavities are filled by sprayed/blown insulation.		
Garage separation	Air sealing is provided between the garage and conditioned spaces.		
Recessed lighting	Recessed light fixtures are air tight, IC rated, and sealed to drywall. Exception-fixtures in conditioned space.		
	Insulation is placed between outside and pipes.		
Plumbing and wiring	Batt insulation is cut to fit around wiring and plumbing, or sprayed/blown insulation extends behind piping and wiring.		
Shower/tub on exterior wall	Showers and tubs on exterior walls have insulation and an air barrier separating them from the exterior wall.		
Electrical/phone box on exterior wall	Air barrier extends behind boxes or air-sealed-type boxes are installed.		
Common wall	Air barrier is installed in common wall between dwelling units.		
HVAC register boots	HVAC register boots that penetrate building envelope are sealed to subfloor or drywall.		
Fireplace	Fireplace walls include an air barrier.		

Name of inspector:	Signature:
Name of Company:	Rater #:

Documentation – Duct Leakage







Phone: 502-573-0395, Fax: 502-573-1401 www.dhbc.ky.gov

Kentucky Residential Energy Code Duct Testing Results

Unless all ducts are located within conditioned space, one of the following must be verified (indicate one): □ Post-construction duct leakage to outdoors is ≤ 8 cfm per 100 ft² @ 25 Pa □ Post-construction total duct leakage is ≤ 12 cfm per 100 ft² @ 25 Pa □ Rough-in total duct leakage with air handler installed is ≤ 6 cfm per 100 ft² @ 25 Pa □ Rough-in total duct leakage without air handler installed is ≤ 4 cfm per 100 ft² @ 25 Pa			
Square footage of conditioned floor area served by HVAC system: ft ²			
Test leakage measurement at 25 Pa: cfm			
Formula: cfm ₂₅ x 100 / ft ² of conditioned floor area served = Duct Leakage Result			
$_$ cfm ₂₅ x 100 / $_$ ft ² of conditioned floor area served = $_$ cfm leakage/100 ft ²			
Kentucku [®]			

Documentation – Simulated Performance Alternative



- Certificate from software submitted with plans
- Plan review/inspection checklist
- Blower door and duct leakage results

2009 IECC Energy Cost Compliance

Property Organization Rachel's Ratings Builder's Lot 555-555-5555 123 Main St RachelSmtth Anytown, USA

Annual Engage Cost

Barry's Buildings

	Annual Energy Cost		\$/yr	
		2009 IECC	As Designed	
	Heating	1356	957	
	Cooling	151	108	
	Water Heating	491	491	
	SubTotal - Used to Determine Compliance	1999	1557	
G.	Lights & Appliances	885	871	
	Photovoltaics	-0	-0	
	Service Charge	120	120	
	Total	3004	2547	
	Mandatory Requirements			
	Duct Insulation R-Value Check (per Section 405.2)			
	Minimum Duct Inculation (Design must be equal or higher)	4.0	9.0	

Minimum Duct Insulation (Design must be equal or higher)	6.0	8.0
Window U-Factor Check (Section 402.5)		
Window U-Factor (Design must be equal or lower)	0.480	0.298
Home Infiltration (Section 402.4.2)		PASSES
Duct Leakage (Section 403.2.2)		PASSES

This home MEETS the annual energy cost requirements of Section 405 of the 2009 International Energy Conservation Code based on a climate zone of 5 A. In fact, this home surpasses the requirements by 22.1%.

Rachel Smith Organization Rachel's Ratings Date 19 February 2015

Mechanical Systems

Heating Fuel-fired air distribution, 66.5 kBtuh, 95.0 AFUE. Cooling

Air conditioner, 24.0 kB tuh, 13.0 SEER. Conventional, Elec, 0.88 EF. Water Heating

Window-to-Floor Area Ratio: 0.11

Blower door test Htg: 1144 Clg: 1144 CFM50

REM/Rate - Residential Energy Analysis and Rating Software v14.5.1

This information does not constitute any warranty of energy cost or savings. © 1985-2014 Architectural Energy Corporation, Boulder, Colorado.



- Become certified via your state
 - This doesn't give you jurisdiction, just demonstrates knowledge and commitment
- Become an ICC-Certified Residential Energy Inspector/Plans Examiner (79)
 - Buy a code book (also available online)
 - Study the code
 - Pass the ICC Certification Exam (2 hours)
 - Continuing education (15 hours per 3 years)
- Get approved as a continuing education provider in your state
- Work with local ICC Chapters



Summary



- Not all builders ready to be EnergySmart builders
- All homes must meet the energy code
- Raters have skills to provide energy code consulting and verification
- Know the code
- Know the code official
- Educate the code official
- Get out there and market your skills/services