Present and Future of RESNET Quality Assurance

Scott Doyle and Laurel Elam, RESNET

Presentation Agenda

- Current Status of Addendum 29

- Status of Other Quality Assurance Changes

- Current Quality Assurance Program and Staff

- Future of RESNET Quality Assurance Program

- Questions

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Addendum 29

- A working group of the SDC 900 reviewed the 27 comments submitted

- Several comments submitted were to strike the sections on creating direct and third-party providers completely

- SDC 900 will request that the Board of Directors revise their original policy on the financial separation of QAD and providers providing rating services

Policy, Amendments & Implementation

- The RESNET Board approves the policy

- The policies are implemented in the RESNET Standards through amendments

- SDCs review public comments and approve the responses to the comments

- RESNET staff enforce the RESNET Standards

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Addendum 29

Addendum 29 was released for public comment and only included:

- Creation of Direct and Third Party Rating Providers
- Creation of Quality Assurance Agents
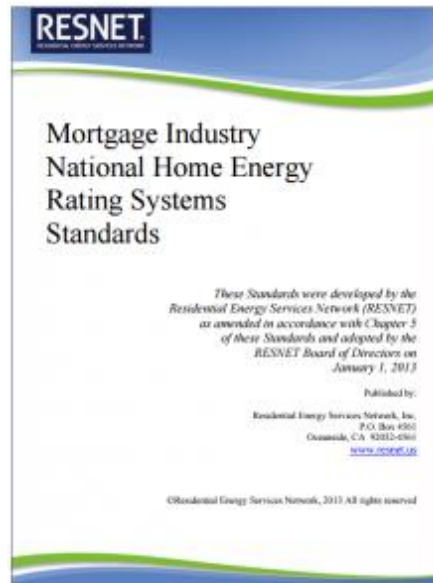
New Provider Models

Direct Providers

- Do ratings in-house

Third-party Providers

- Do not do ratings in-house

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Quality Assurance Agents

Anyone doing quality assurance for RESNET will become "Agents of RESNET" and will be trained.

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Why a smaller QA Amendment?

- Changes were lost in the larger amendment
- Help facilitate the consideration and adoption

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Let's Go Back to 2013
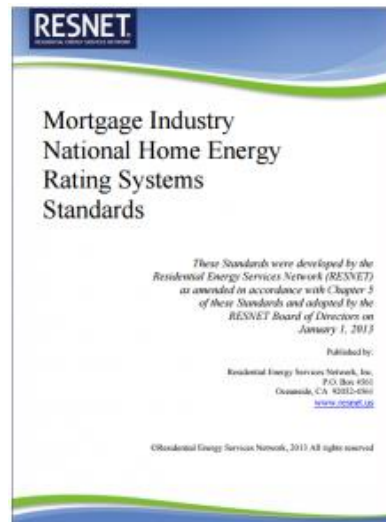
What was the reason for making these changes?

RESNET Board Analysis Found

- Inconsistency of quality assurance oversight by Rating Providers

- Inconsistency of the way the various software programs allowed variance of raters in inputting data into the program

- Inconsistency of Home Energy Rater candidate testing

Chapter Two

- Amendments to chapter two require:
  - Rater candidates to take rater training so they can no longer challenge the rater exam
  - All five probationary ratings are conducted with a rating provider and overseen by a candidate field assessor

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Mortgage Industry
National Home Energy
Rating Systems
Standards

*These Standards were developed by the
Residential Energy Services Network (RESNET)
as amended in accordance with Chapter 5
of these Standards and adopted by the
RESNET Board of Directors on
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Software

Policies adopted at the 2013 Fall Board meeting

- RESNET incorporate changes to rating software standards that would include:
  - Establish limits on input variables for whole-house ventilations systems and other in the RESNET Standards
  - Determine bounds checks that can be incorporated into software to limit or warn users when input values are beyond reasonable limits
  - Enhance rating software tools to enable flags to be set for internal inconsistencies that should be checked prior to entering a building file into RESNET registry

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Software- More work to do!

- HERS Software Consistency Task Group has been created and includes representatives from all of the software vendors

- Session "HERS Consistency - A Discussion from a Software Perspective" at 3:30 PM today Grand Salon I

- This session will be a review of their findings and recommendations

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Fall 2013 RESNET Board Meeting

Approved the following policies

- RESNET certified Quality Assurance Designees must in the future:
  - Serve as agents of RESNET
  - Have neither a financial interest nor an employee/employer relationship with the entity performing the rating

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What has changed since then?

- The Registry wasn't being utilized fully for QA report reviews until 2014 because 2013 was the first year of complete data

- Since 2013 there have been drastic improvements in the implementation of RESNET QA standards

- QA Genie is now being used

"Life is like underwear, change is good."

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Enhancing the Consistency of HERS Index Scores

Goals for RESNET Quality Assurance

- Consistency in the ratings completed by Raters
- Consistency in Quality Assurance

CONSISTENCY IS THE KEY

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What is the solution?

- Does the proposed solution of financially separating QADs from Providers address the inconsistent QA processes, interpretations, and enforcement of standards?

- Can this be addressed through training of both QADs, Raters and RFIs?
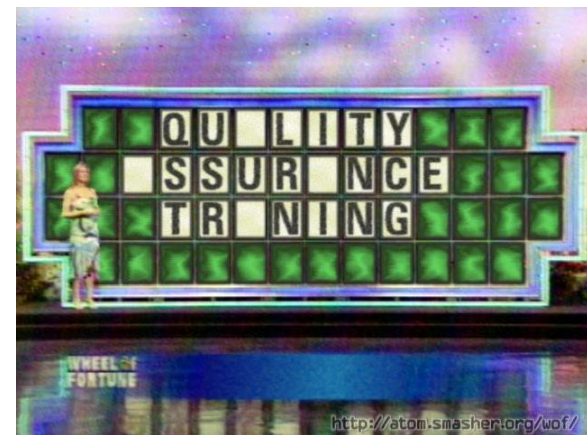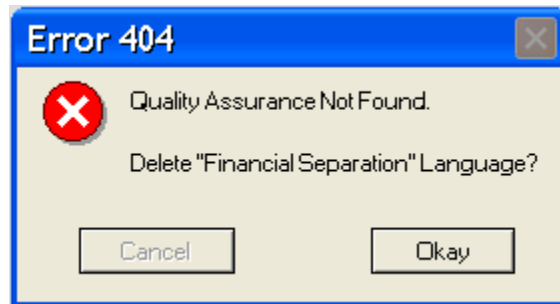
Other changes to QA Standards

- Other changes to the QA standards are on hold until a decision can be made by the RESNET Board

- Once a decision has been made other changes may be required before it goes out for public comment again

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RESNET QA Today

We are building our QA Team!

- Scott Doyle joined RESNET in July 2017 as Quality Assurance Manager

- Addition of other RESNET Staff

- Will be adding an Infield QA Specialist in 2018

The Daily W

Tuesday, July 1, 2017

RESNET Bolsters QA Team

Scott Doyle is the RESNET Quality Assurance Manager and former Director of Field Services for EnergyLogic. Since earning Rater Certification in 2003, Scott has performed inspections on thousands of homes across a variety of construction types and climate zones. In 2007 he became a RESNET certified Quality Assurance Designee. As Primary QAD for multiple HERS Providers, he oversaw and mentored a large team of Quality Assurance Designees and Delegates. Scott served as Primary Trainer for EnergyLogic Academy from 2008-2014, training hundreds of Energy Professionals across the U.S. using a variety of formats including field, classroom, and e-learning. He recently served as Chair of SDC-200, Chair of the RESNET Exam Working Group, and is a member of the Quality Agent Training Working Group.

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RESNET QA Today

- Improvement in annual QA reports and enforcement of the RESNET QA standards.

- Fewer providers being placed on probation for not meeting the annually required file and field QA review requirements

- Now have the ability to track QA in the Registry

A DAY MAY COME WHEN THE QUALITY ASSURANCE OF MAN FAILS TO IMPROVE

BUT IT IS NOT THIS DAY

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Online QA Reviews

Online Reviews are Viewed as Positive

File Review Process

Using QA Genie

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Online QA Reviews

Only 1-in-4 Providers are reached annually

Only the Primary QAD joins the call

Does not include in-field mentoring or monitoring

What's Missing?

QA Genie

Want to know more about the findings from QA Genie?

Session "The Genie is out of the Bottle! What we have Learned so far from QA Genie"

Wednesday 1:30 PM Grand Salon VII

Future of RESNET QA

- Improvements in Past Several Years

- Still Discovering Inconsistencies

- RESNET needs to have a presence in the field working with QADs and providers

PSYCHIC READING ON FUTURE OF QA

CANCELLED DUE TO UNFORESEEN CIRCUMSTANCES

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What do the Standards Say?

Section 902.1 RESNET shall select a <u>minimum</u> of 25% of accredited QA Providers and conduct a more detailed review of their Quality Assurance records.

Plans for 2018

50% of Providers and their QADs will have enhanced RESNET QA Annually

- 25% Online Review
- 25% In-Field Review

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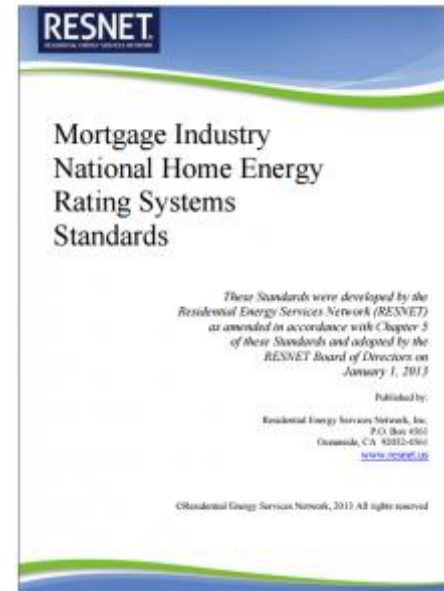
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Plans for 2018

Train All QADs and Delegates

- Quarterly Webinar Series

Plans for 2018

Train All QADs and Delegates

Introduce the new Field/File QA Checklist

QAD Roundtable-

Tuesday 2:15 PM Grand Salon I

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Questions?

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